

ALASKA VISITOR STATISTICS PROGRAM



ALASKA VISITOR PATTERNS, OPINIONS AND PLANNING SUMMER 1993

Department of Commerce & Economic Development
Alaska Division of Tourism
State of Alaska



JUNEAU • KETCHIKAN



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Introduction



Introduction

The *Alaska Visitor Statistics Program (AVSP)* was launched by the State of Alaska Division of Tourism in 1985. This ground-breaking visitor industry research program has been recognized as one of the most sophisticated among the 50 states. The McDowell Group of Juneau and Ketchikan, Alaska was selected by the Division of Tourism to conduct the 1993-94 study. This firm was also the program contractor in 1989-90 and in 1985-86.

Tourism continues to be an industry of growing importance to the state. Once regarded as a stepchild of the major traditional resource industries, tourism's tremendous growth in the past 10 years has given it legitimacy as a major industry. The *AVSP*, now in its third incarnation, is a critical link in understanding the Alaska tourism market. This program provides detailed information about visitors to the state so that government and industry can channel their marketing and development efforts in the most productive fashion.

The *AVSP* program consists of sampling arriving visitors for the period of one year by personal intercept interview, an expenditure diary survey, and a follow-up mail survey. The methodology developed by the McDowell Group has consistently yielded national records in response rates for visitor survey research; 97% for the personal intercept survey, 62% for the diary and 68% for the comprehensive mail survey for Summer 1993. These response levels are similar to previous years.

The program has four distinct but interdependent phases. These are the *Arrival Count*, *Random Arrival Survey*, *Visitor Expenditure Survey*, and *Visitor Opinion Survey*. The exhibit and map on the following pages show the survey locations and program phases.

A series of six comprehensive reports result from these surveys. This report, *Patterns, Opinions and Planning, Summer, 1993*, is the third in the *AVSP III* series.

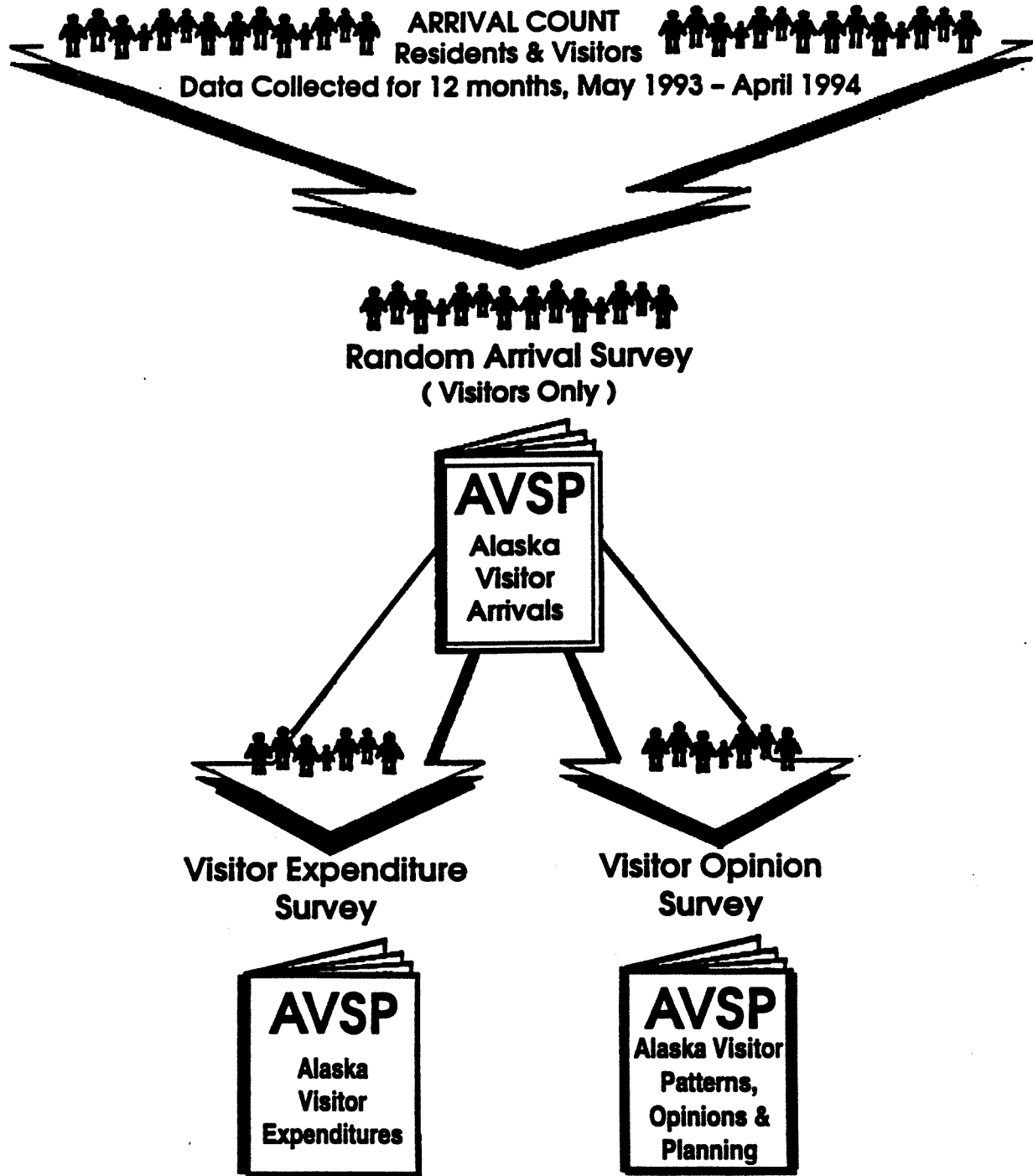
Alaska Visitor Statistics Program III Phases

Phase	Description	Purpose
1. Arrival Count (AC)	Secondary research collection of data on all passengers arriving in Alaska at their first points of entry.	To quantify the number of visitors and residents entering the state by each mode, using ratios found in the RAS phase, below.
2. Random Arrival Survey (RAS)	Personal intercept interviews with a scientific sample of visitors at their first point of entry.	To determine composition of visitors including their trip purpose, modes of entry/exit, origin, age, party size, gender, and travel type. To measure resident/visitor ratios for each entry mode for expansion to Arrival Count data. To collect names and addresses for VOS mail out survey. To administer VES diary to arriving visitors.
3. Visitor Expenditure Survey (VES)	29-day expenditure diary booklet distributed on arrival to every other RAS respondent.	To provide visitor expenditure data by detailed category and by region and community.
4. Visitor Opinion Survey (VOS)	20-page survey booklet with personalized cover letter from DOT Director mailed to every other RAS respondent (half not getting a diary) after their return home.	To assess visitor use of, and satisfaction with, statewide and regional facilities, accommodations, attractions, transport modes and activities. To determine visitor volume by community, region and attraction. To collect trip characteristics data. To collect data on the Alaska trip planning process, travel habits and demographics.

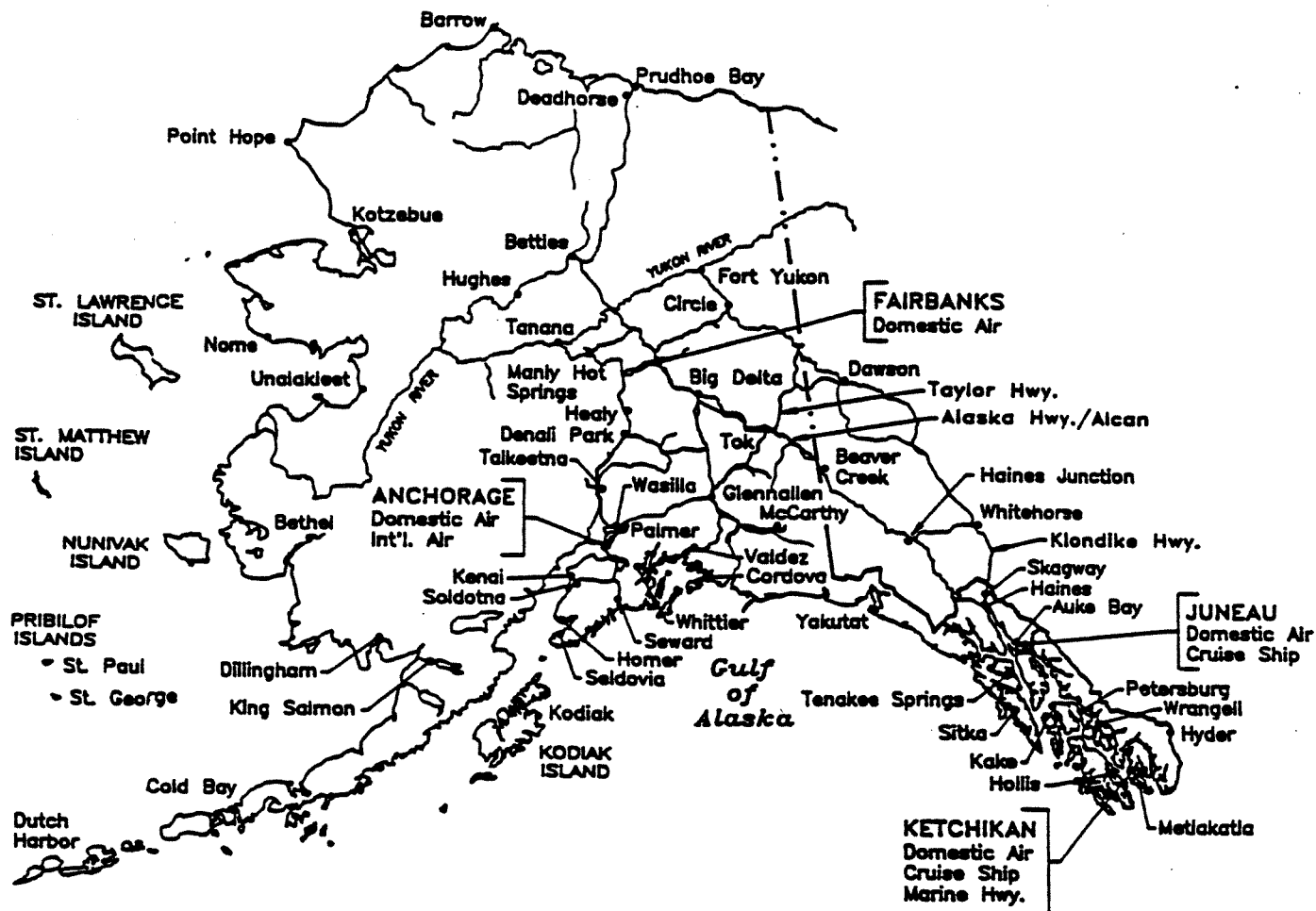
The six major reports to be generated as part of the program are:

Report	Date
1. Alaska Visitor Arrivals, Summer 1993	January 1994
2. Alaska Visitor Expenditures, Summer 1993	March 1994
3. Alaska Visitor Patterns, Opinions and Planning, Summer 1993	May 1994
4. Alaska Visitor Arrivals, Fall/Winter/Spring, 93-94	October 1994
5. Alaska Visitor Expenditures, FWS 93-94	November 1994
6. Alaska Visitor Patterns, Opinions and Planning, F/W/S 93-94	December 1994

Alaska Visitor Statistics Program III Phases



Random Arrival Survey Locations



ENTRY TRANSPORTATION MODE

SURVEY LOCATION	Domestic Air	Cruise Ship	Highway	Marine Highway	International Air
ANCHORAGE	X				X
FAIRBANKS	X				
JUNEAU	X	X			
KETCHIKAN	X	X		X	
Alaska Hwy.			Auto		
Klondike Hwy.			Auto		
Taylor Hwy.			Auto		

NOTE:

Marine Highway is sampled onboard vessels from Prince Rupert and Bellingham underway to Ketchikan. Alaska Highway is sampled at intersection of Taylor Highway and Alaska Highway near Tok. Klondike Highway is sampled at the U.S. Customs Service station at Skagway.

Reader Notes

Sample Size Considerations

The Summer 1993 Visitor Opinion Survey (VOS) sample includes 1,434 visitor parties and has a maximum margin of error of $\pm 2.7\%$ for total results. The sample size for Vacation/Pleasure visitors is 1,154 and has a maximum margin of error of $\pm 3.0\%$.

The response rate for the survey was 68%, slightly less than the Summer 1989 results, but still exceptional for mail surveys. The average VOS represents 277 traveling parties comprised of 584 individual visitors.

The AVSP program is designed to yield a great deal of data that is accurate on a statewide basis. Because of the large sample and the strict sample quality control, the project also yields much sound data at the regional and community levels. However, as explained below, there are limitations to the accuracy of small group characteristics.

Survey results with more than 17,500 visitors (represented by a subsample of about 30 or more Visitor Opinion Surveys) are considered quite accurate. Detailed characteristics of groups smaller than this are subject to statistical laws of small sample size and may not always be accurate. Some small subsamples may be quite accurate depending on the dispersion concentration of the data, so a sample size rule does not apply uniformly.

However, readers should view with some caution subsample details from groups numbering less than 17,500 or less than 2% of total visitors. For example, the number of visitors to the Aleutian Islands is quite accurate, though it is a small number. Further details, such as the number of Aleutian Islands visitors from Florida, are beyond the statistical parameters of this study which is designed for accurate statewide results.

Comparing Rating Trends

Visitor opinion ratings are beginning to show some differences from previous studies. For this report, Summer 1993 ratings were tested for statistical significance with ratings from Summer 1989. To be comparable, only ratings from June through September were used. The analysis of these differences is found in the *Trends and Marketing Implications* section of the Summary.

Organization of the Study

Following the Summary, the first two chapters present detailed data on the total Alaska visitor market. The study emphasizes the Vacation/Pleasure visitor market, which accounts for nearly three-quarters of all summer visitors. The Vacation/Pleasure visitor market is the market most impacted by marketing programs of all kinds. Chapter III details statewide characteristics of the Vacation/Pleasure visitor market, while Chapter IV identifies the Vacation/Pleasure visitor market for each of Alaska's five major visitor regions.

Chapter V provides detailed statistical profiles for three major types of analysis – Trip Purpose, Mode Use (meaning mode markets) and Origin. The Trip Purpose analysis provides detailed data for the small markets of Business Only visitors, those who combine Business and Pleasure and those whose primary purpose is to Visit Friends and Relatives on their Alaska trip.

Glossary of Terms

Entry Mode: Entry Mode refers to the transportation mode used by visitors to enter Alaska.

Mode Use: Mode use refers to the total number of users traveling by a particular transportation mode. This includes visitors who traveled round-trip by a single transportation mode and visitors who used the mode for one leg of their journey.

Summer Season: The Summer Season for 1986 through 1992 was defined as June, July, August, and September. For the 1993-94 AVSP, May was added to the definition of the Summer Season.

Travel Type: This identifies three distinct visitor groups including package, Independent and Inde-Package visitors.

Trip Purpose: This term refers to four groups developed to define the reason for taking an Alaska trip. These are Vacation/Pleasure (VP), Visiting Friends and Relatives (VFR), Business Only (BO), Business and Pleasure (BP).

Executive Summary

Marketing Implications



Executive Summary

Visitor Opinions

Overall Alaska Trip Ratings

- Visitors were extremely pleased with their overall Alaska trip experience, rating it 6.1 on the 1 (poor) to 7 (excellent) scale, slightly lower than in 1989. More than three-quarters (77%) awarded ratings of "very good" to "excellent". Vacation/Pleasure visitors also gave very positive ratings to their overall Alaska trip, with an average of 6.2.
- Alaska is rated a somewhat better than average value for the money compared with other destinations, with an average rating of 5.3 on the 1 (poor) to 7 (excellent) scale. Vacation/Pleasure visitors rated their Alaska trip as a better than average value for the money with an average of 5.4. These ratings were slightly lower than in 1989.
- The Alaska experience exceeded most visitors' expectations with the average rating for all visitors of 5.7 and Vacation/Pleasure visitors averaged 5.9. Almost one-third (31%) of visitors felt their trip exceeded their expectations at the highest level, awarding a rating of "excellent".

Value for the Money Ratings

- Of the nine aspects of the overall Alaska trip, the friendliness/helpfulness of the Alaska people and sightseeing/attractions were rated as the best values (6.1 and 5.8 respectively on the 1 to 7 scale). Vacation/Pleasure visitors rated these two aspects slightly higher at 6.2 and 5.9, respectively.
- Lowest rated aspects of value for the money ratings were accommodations (5.1) and restaurants (4.9). Vacation/Pleasure visitors rated these two aspects slightly higher at 5.2 and 5.1, respectively.
- Activities and transportation to Alaska were rated 5.4 on the 1 to 7 scale, in terms of value for the money. Transportation overall, from Alaska and within Alaska were rated 5.3. Vacation/Pleasure visitors rated activities and transportation overall at 5.5. Transportation to Alaska, from Alaska, and within Alaska were rated 5.4 by Vacation/Pleasure visitors.

Table S-A

**Average Alaska Trip Ratings
("1" poor and "7" Excellent Scale)
Summer 1993**

	All Visitors	Vacation/Pleasure
Overall Alaska Trip Rating	6.1	6.2
Value for Money	5.3	5.4
Compared to Expectations	5.7	5.9

Table S-B

**Value for Money Ratings
Summer 1993**

	All Visitors	Vacation/Pleasure
Accommodations	5.1	5.2
Transportation Overall	5.3	5.5
Transportation to AK	5.4	5.4
Transportation from AK	5.3	5.4
Transportation within AK	5.3	5.4
Sightseeing/Attractions	5.8	5.9
Activities	5.4	5.5
Restaurants	4.9	5.1
Friendliness/Helpfulness	6.1	6.2

Likelihood of Recommending and Visiting Alaska Again

- Almost one-third of all visitors felt it was "very likely" they would visit Alaska again for pleasure. More than one-quarter (28%) of Vacation/Pleasure visitors were "very likely" to visit Alaska again for pleasure. Fewer visitors were likely to visit Alaska again for business.
- Approximately three out of five visitors were "very likely" to recommend Alaska as a vacation destination. Many visitors commented that upon returning from their trip, they had already recommended Alaska to someone.

Table S-C

Likelihood of Recommending Alaska and Visiting Alaska Again (Percent Indicating "Very Likely") Summer 1993

	All Visitors	Vacation/Pleasure
Repeat for Pleasure	31%	28%
Repeat for Business	13	3
Recommend Alaska	57	61

Biggest Misconceptions About Alaska

- The biggest misconception cleared up by a visit to Alaska was the weather. Nearly one-half of all visitors and Vacation/Pleasure visitors said the weather was better than expected.
- Approximately one in five visitors (20%) and Vacation/Pleasure visitors (18%) said Alaska was different than expected. Only a small portion of visitors indicated Alaska was worse than expected. Of concern among this group were the attractions/appeal of Alaska, accommodations/transportation facilities, prices/cost, and roads.

Table S-D

Biggest Misconception Cleared Up By Visit to Alaska Summer 1993

	All Visitors	Vacation/Pleasure
Better than Expected	64%	67%
Weather Better than Expected	46	45
Different than Expected	20	18
Worse than Expected	12	15

Visitor Travel Patterns

Entry and Exit Modes

- The primary mode for all visitors to Alaska was Domestic Air followed by Cruise Ship. Vacation/Pleasure visitors utilized Domestic Air and Cruise Ship almost equally.
- Exit mode patterns closely resembled entry mode patterns for all visitors. For Vacation/Pleasure visitors, Domestic Air became the primary exit mode followed by Cruise Ship mode.

Table S-E

Entry and Exit Modes Summer 1993

Mode	Entering Visitors	Percent	Entering VP Visitors	Percent
Domestic Air	443,600	53%	254,800	40%
Cruise Ship	247,000	30	244,700	39
Highway ¹	104,000	12	97,300	15
Ferry	29,100	3	24,700	4
International Air	13,300	2	9,300	1
Mode	Exiting Visitors	Percent	Exiting VP Visitors	Percent
Domestic Air	454,400	54%	266,100	42%
Cruise Ship	227,700	27	224,100	36
Highway ¹	103,200	12	95,700	15
Ferry	31,300	4	28,500	5
International Air	16,700	2	12,800	2
Other	600	<1	600	<1
Unknown	3,100	<1	3,100	<1

¹ Highway mode includes personal vehicles only. Not included are motorcoaches and trucks.

Mode Market Size

- More visitors and more Vacation/Pleasure visitors used Domestic Air for entry, exit, or both than any other transportation mode. The second most used mode by both all visitors and Vacation/Pleasure visitors was Cruise Ship.
- The Highway was third with 11% of the total market and 13% of the Vacation/Pleasure market. Though Ferry and International Air modes carried fewer visitors than other modes, they are nevertheless important to the total transportation picture.

Table S-F

Mode Market Size (Excludes Seasonal Workers) Summer 1993

	All Visitors	Vacation/Pleasure
Domestic Air	543,700	351,000
Cruise Ship	317,500	313,800
Highway ¹	120,600	111,800
Ferry	50,900	45,700
International Air	19,600	14,800

¹ Highway mode includes personal vehicles only. Not included are motorcoaches and trucks.

Visitor Travel Type

- The majority of Alaska visitors (55%) traveled as Independents, not on a prearranged package tour. One-quarter of these Independent travelers purchased sightseeing while in the state and are known as Inde-Package visitors.
- The majority of Vacation/Pleasure visitors (57%) traveled on prearranged package tours. Among the 44% who were Independents, one-third (34%) were Inde-Package visitors who purchased sightseeing while in the state.

Table S-G

Visitor Travel Type Summer 1993

	All Visitors	Vacation/Pleasure Visitors
Package	45%	57%
Independent	41	29
Inde-Package	14	15

Length of Stay

- The average length of stay for all visitors was 9.8 nights, a full night less than in 1989. The overall average is influenced by the shorter stays of Visiting Friends and Relatives and business travelers. The most common lengths of stay were three to six nights (41%) and seven to thirteen nights (36%). One-half of all visitors stayed seven to twenty-nine nights.
- The average length of stay for Vacation/Pleasure visitors was 9.5 nights, nearly the same as in 1989. Most Vacation/Pleasure visitors stayed either three to six nights (41%) or seven to thirteen nights (38%).
- The visitors who stayed the longest were those Visiting Friends/Relatives, Ferry users, Inde-Package visitors, Europeans, Highway users, International Air users and Midwesterners. Shortest stays were by round-trip cruisers, Canadians, visitors from Australia/New Zealand, and Air/Cruise visitors.

Lodging Type

- The lodging types most often used by all visitors were (in order) hotels/motels, cruise ships, private homes, resorts/lodges and RV/campgrounds. Ferries were used by a small percentage, as were bed and breakfasts, a small but growing lodging segment. Fewer visitors stayed in wilderness settings, such as cabins and in other lodging types, such as on private boats. Visitors stayed longer in RV/campgrounds and private homes than in any other lodging type.
- Among Vacation/Pleasure visitors, cruise ships were used most often, followed by hotels/motels, resort/lodges, RV/campgrounds and private homes. Ferries and bed and breakfasts were also used by a small percentage of visitors. Vacation/Pleasure visitors stayed longer in RV/campgrounds, wilderness lodgings, such as cabins and tents, and private homes than in any other lodging type.

Table S-H

Lodging Type Summer 1993

Lodging Type	All Visitors % Using	Avg. # of Nights*	VP Visitors % Using	Avg. # of Nights*
Hotel/Motel	49 %	24.1	45 %	3.8
Resort/Lodge	20	2.0	24	2.1
Bed & Breakfast	9	3.3	9	3.4
Private Home	21	10.5	13	8.2
RV/Campground	15	12.0	18	12.7
Cruise Ship	39	4.6	51	4.5
Ferry	8	2.5	9	2.3
Wilderness Other	8	7.5	8	8.3
Other	5	8.0	3	6.2

* Average number of nights of those using particular lodging type.

Regions Visited

- For all visitors, Southcentral accommodated more visitors than any other region. Southeast was the second most visited region, followed by Denali/McKinley, Interior/North and Southwest.
- Among Vacation/Pleasure visitors, Southeast was the most visited region attracting nearly three out of four Vacation/Pleasure visitors. Southcentral was the second most visited region by Vacation/Pleasure visitors, followed by Denali/McKinley, Interior/North and Southwest.

Table S-I

Regions Visited Summer 1993

Regions Visited	All Visitors	%	Vacation/Pleasure	%
Southcentral	569,300	68%	411,000	65%
Southeast	502,800	60	463,100	73
Interior/North	295,100	35	243,900	39
Southwest	47,100	6	25,600	4
Denali/McKinley	301,200	36	269,600	43
Total	836,900	100%	630,900	100%

Communities Visited

- The five most frequently visited communities by all visitors and Vacation/Pleasure visitors were identical:

Table S-J

Communities Visited Summer 1993

Community	All Visitors	%	Vacation/Pleasure	%
1. Anchorage	543,600	65%	387,100	61%
2. Juneau	408,700	49	383,400	61
3. Ketchikan	386,900	47	366,100	58
4. Skagway	318,900	38	311,300	49
5. Denali/McKinley	301,200	36	269,600	43

- The next five most visited communities in the top ten for all visitors were:

Table S-J Continued

Communities Visited All Visitors - Summer 1993

6. Glacier Bay	263,600	32%
7. Fairbanks	257,000	31
8. Seward	248,100	30
9. Sitka	234,200	28
10. Palmer	169,000	20

- The next five most visited communities in the top ten for Vacation/Pleasure visitors were:

Table S-J Continued

Communities Visited Vacation/Pleasure Visitors - Summer 1993

6. Glacier Bay	256,400	41%
7. Fairbanks	220,600	35
8. Sitka	219,600	35
9. Seward	208,300	33
10. Tok	133,900	21

Attractions Visited

- The Inside Passage was the most visited attraction by all visitors in 1993, switching places with Portage Glacier since 1989. Mendenhall Glacier maintained its status as the third most visited attraction. The Transalaska Pipeline and Sitka were two new additions to the top ten most visited attractions list since 1989.

Table S-K

Ten Most Visited Attractions by All Visitors Summer 1993

Attraction	Number of Visitors	Percent
1. Inside Passage	387,200	46%
2. Portage Glacier	370,000	44
3. Mendenhall Glacier	331,800	40
4. Ketchikan Totems	331,800	40
5. Denali/McKinley	301,200	36
6. Skagway's Historic Gold Rush District	296,700	35
7. Glacier Bay	256,400	31
8. Anchorage Museum of History & Art	216,300	26
9. Transalaska Pipeline	200,700	24
10. Sitka's Russian Church & Dancers	186,000	22

- The Inside Passage remained the most visited attraction for Vacation/Pleasure visitors, since 1989, followed by the Ketchikan Totems, Mendenhall Glacier, Skagway and Denali/McKinley. Sitka was a new addition to the ten most visited attractions list for Vacation/Pleasure visitors.

Table S-L

Ten Most Visited Attractions by Vacation/Pleasure Visitors Summer 1993

Attraction	Number of Visitors	Percent
1. Inside Passage	370,500	59%
2. Ketchikan Totems	314,900	50
3. Mendenhall Glacier	310,300	49
4. Skagway's Historic Gold Rush District	282,500	45
5. Denali/McKinley	269,900	43
6. Portage Glacier	263,000	42
7. Glacier Bay	245,500	39
8. Sitka's Russian Church & Dancers	180,600	29
9. Transalaska Pipeline	173,200	27
10. Anchorage Museum of History & Art	168,500	27

Visitor Trip Planning

Alaska Trip Planning Timelines

- The average visitor decided to come to Alaska 7.2 months in advance and actually made the travel arrangements 4.4 months ahead of time. One-quarter of the market chose Alaska as their destination a year or more in advance. One-fifth of the market decided to come to Alaska at six to seven months and another one-fifth at two to three months. More than one-half of all visitors made their travel arrangements in three months or less.
- Vacation/Pleasure visitors made their Alaska trip timing decision almost eight months in advance and their travel arrangements five months ahead of time, on average.

Table S-M

Average Alaska Planning Timelines
(Average Number of Months)
Summer 1993

	All Visitors	Vacation/Pleasure
"When Alaska?" Decision	7.2	7.8
Trip Arrangements Made	4.4	5.0

Alaska Trip Decision Criteria

- Leading factors which influenced the timing of why visitors chose to come to Alaska in 1993 rather than another time included personal reasons (chance to travel with friends/relatives, long time desire, honeymoon/anniversary), chance to visit friends and relatives, business, and attractions/appeal of Alaska.

Table S-N

Alaska Trip Decision Criteria
Summer 1993

	All Visitors	Vacation/Pleasure
1. Personal Reasons	43 %	54 %
2. Business	14	1
3. Visit Friends and Relatives	14	7
4. Attractions/Appeal of Alaska	13	18
5. Recommended by Others	6	8
6. Price/Discount Considerations	4	5
7. Advertising/Promotion	2	3
8. Visit All 50 States	<1	<1
9. Weather	<1	-
10. Other	4	4

Competing with Other Destinations

- Alaska's main competitor for visitors in 1993 was Europe, followed by Canada, Hawaii and Mexico. Family issues were the leading reason why Alaska was chosen over Europe. These issues included the chance to travel with family members and visiting relatives during the trip.
- Price or discount considerations were another commonly cited reason for selecting Alaska over its top ten competitors. This implies that Alaska is continuing to be price competitive with rival destinations.

Travel History and Future Preferences of Alaska Visitors

- Approximately one-third of all visitors and Vacation/Pleasure visitors to Alaska have been to Europe in the past five years. About one-fifth of Alaska visitors have been to Hawaii. Florida established itself as a major destination, with 24% of all visitors and 22% of Vacation/Pleasure visitors having traveled there in the past five years.
- One-fifth of all visitors would prefer to return to Alaska for their next vacation, with 14% stating they will probably return to Alaska for their next vacation. Similar percentages of visitors state a preference and probability of Europe as their next vacation destination.

Trip Information Sources

- The most important source of information for all visitors and Vacation/Pleasure visitors were travel agents.
- Friends/Relatives, Tourism-related State agencies (such as the Alaska Division of Tourism and the Alaska Tourism Marketing Council), books/brochures and commercial organizations (such as tour companies) were also important sources of information for visitors.
- One-fifth of all visitors in Summer 1993 requested the *State of Alaska Official Vacation Planner* as a trip information source, a somewhat lower proportion than in 1989. One-quarter of Vacation/Pleasure visitors utilized the Planner, also a lower percentage than in 1989.

Table S-O

Trip Information Sources Summer 1993

	All Visitors	Vacation/Pleasure
1. Travel Agents	53 %	59 %
2. Friends/Relatives	23	18
3. Tourism Related State Agency	21	24
4. Books/Brochures	14	16
5. Commercial Organizations	11	12
6. Clubs/Non-profits	8	9
7. Previous Visits	6	3
8. Media	5	6
9. Other	5	3
10. Chambers of Commerce	1	1
11. Other State Agencies	1	1
12. Local Government	1	1
13. Federal Government	<1	<1
14. Other Government Agencies	<1	<1

Other Trip Planning Information

- Only 16% of visitors received unsolicited brochures on Alaska, but of those who did 31% received six or more pieces.
- Three out of five visitors and Vacation/Pleasure visitors utilized special newspaper travel sections as an information source on Alaska. These travel sections were read by 65% of all Package visitors. More than one-half of all Overseas visitors read newspaper sections.
- Frequent flyer program mileage was used by someone in three out of ten Domestic Air user parties.

Travel Agent Involvement in Trip Planning

- Travel agents provided a variety of services to Alaska visitors. The two most common were providing brochures and actual booking of cruises or tours. Travel agents were also important for recommending booking lodging/transportation, recommending transportation mode, type of trip, travel company, and specific places of interest.

Table S-P

Travel Agent Involvement Summer 1993

	All Visitors	Vacation/Pleasure
1. Provided Brochures	39 %	49 %
2. Booked Cruise or Package Tour	38	49
3. Booked Independent Lodging/Transportation	23	19
4. Recommended Transportation or Trip Type	18	21
5. Recommended Travel Company	13	16
6. Recommended Specific Place of Interest	10	13
7. Recommended Alaska	9	10
8. Recommended Lodging	7	7
9. Other	1	1

Demographics

- Alaska visitors were well educated. More than one-half of all visitors and Vacation/Pleasure visitors were college graduates. Almost another one-quarter had some college education.
- Alaska visitors were moderately well-to-do with average household incomes just over \$60,000. More than one-quarter of all visitors and Vacation/Pleasure visitors earned more than \$75,000.
- The average Alaska visitor was 50 years old. Approximately one-half of all visitors were over the age of 55 years. Slightly more males than females visited.
- More than one-half of all visitors were employed at the time of their visit. More than two out of five (43%) Vacation/Pleasure visitors were retired.
- The West continues to be the most important producer of Alaska visitors, followed by the South among all visitors and Overseas among Vacation/Pleasure visitors.

Table S-Q

Demographics Summer 1993

	All Visitors	Vacation/Pleasure
Visitor Education		
Not High School Graduates	4 %	5 %
High School Graduates	20	21
1 - 3 Years College	24	23
College Graduate	25	24
Attended or Completed Graduate School	27	27
Visitor Household Income (Average - \$60,500)		
Under \$25,000	9 %	10 %
\$25,000 - \$34,999	16	16
\$35,000 - \$49,999	20	22
\$50,000 - \$74,999	25	25
\$75,000 - \$99,999	17	15
\$100,000 and Over	12	12
Visitor Age (Average - 50 Years Old)		
Under 18 Years	5 %	5 %
18 - 24 Years	3	3
25 - 34 Years	10	9
35 - 44 Years	14	12
45 - 54 Years	19	18
55 - 64 Years	22	23
65 - 74 Years	22	24
75 + Years	6	7
Visitor Gender		
Male	53 %	50 %
Female	47	50
Visitor Employment		
Employed	52 %	47 %
Retired	38	43
Other	10	10
Visitor Origin		
West	37 %	29 %
California	14	11
Washington	9	6
Midwest	15	15
South	21	17
East	12	9
Canada	8	10
Overseas	7	20
G/S/A*	2	11
Great Britain	1	1
Japan	1	4
Australia/New Zealand	2	2

*Germany/Switzerland/Austria

Marketing Implications

The results of the Summer 1993 *Visitor Opinion Survey* presented in this report provide important and practical information for marketers in all aspects of the visitor industry. Through these surveys, the state is also compiling meaningful trend data that can guide the growth and development of the visitor industry. This section highlights a few key trends and discusses the implications for the industry.

Visitor Opinion Rating Trends and Implications

Visitor satisfaction and value for the money are rated very highly. However, the overall ratings have declined slightly since Summer 1989.

The overall satisfaction ratings for trip rating, expectations and value for the money were tested to determine whether these rating changes were statistically significant. *For all three questions the Summer 1993 responses were significantly different from the Summer 1989 responses.* In other words, the respondents to the Summer 1993 *Visitor Opinion Survey* were less satisfied than respondents to the same survey in Summer 1989.

It is important to remember that the ratings in the following table are still well above average and considered good to excellent on the scale used in the survey. The question is why are visitors less satisfied in Summer 1993 than four years ago? Further analysis and statistical testing of different visitor groups was conducted to find clues for these rating differences.

**Overall Ratings Trends
Summers 1985, 1989 and 1993
All Visitors – June - September**

	1985	1989	1993
Overall Trip Rating	6.2	6.3	6.1
Compared to Expectations	5.8	5.9	5.7
Value for the Money	5.5	5.5	5.3

(Note about statistical tests: The statistical testing that was conducted was done using the results of June-September 1993 to be comparable with Summer 1989).

The next table examines the rating trends by different visitor groups, namely trip purpose, mode use, travel type and region visited. The ratings in bold and italic type represent those ratings whose differences are statistically significant.

- **Trip Purpose** – Vacation/Pleasure (VP), Business & Pleasure and Business Only visitors showed statistically significant differences between 1989 and 1993 only in their overall trip rating. Although there was a drop in ratings for expectations and value for the money for these groups, these drops were not statistically significant. Visiting Friends and Relatives ratings actually improved for overall trip and expectations.
- **Mode Users** – Those using Domestic Air rated their 1993 experience significantly lower for all three questions, Cruise Ship for overall trip and expectations, and International Air for value for the money only. Highway and Ferry ratings for these questions were not significantly different from 1989.
- **Travel Type** – Package visitors ratings were significantly different for overall trip rating and expectations, but value for money remained the same. Independent visitor ratings were not significantly different between 1989 and 1993, while Inde-Package visitors were for overall trip only.
- **Region Visited** – For overall trip rating, significant differences were seen in the ratings of those who visited Southeast, Southcentral and Interior/North. Only those who visited Southeast had significant differences in their expectations rating. Value for the money ratings were not significantly different for any region.

Based on the data, three of the four trip purpose groups reported declining satisfaction with their overall trip experience. The greatest change was found among business-related visitors; the least change was among VP visitors. VPs, who are the heaviest users of cruise ships and are largely package visitors, clearly influenced the ratings among these groups. The Domestic Air ratings decline is a result of the heavy use of this mode by both business-related visitors and VPs.

Ratings Trends¹
Summers 1989 and 1993
All Visitors – June-September

	Overall Trip Rating		Compared to Expectations		Value for Money	
	1989	1993	1989	1993	1989	1993
Trip Purpose						
Vacation/Pleasure	6.3	6.2	5.9	5.8	5.5	5.4
VFR	6.2	6.3	5.8	6.0	5.3	5.2
Business & Pleasure ⁴	6.3	5.9	5.7	5.4	5.3	5.0
Business Only ⁴	5.9	5.2	6.7	5.0	5.5	4.7
Mode Use						
Domestic Air	6.3	6.0	5.9	5.7	5.4	5.1
Cruise Ship	6.4	6.3	6.2	6.0	5.8	5.8
Highway ²	6.1	6.0	5.5	5.5	5.1	5.1
Ferry	6.3	6.3	5.8	5.9	5.2	5.1
International Air	6.2	5.9	5.7	5.5	5.4	4.8
Travel Type						
Package	6.4	6.2	6.1	5.9	5.8	5.7
Independent	6.0	5.9	5.7	5.6	5.2	5.0
Inde-Package ³	6.4	6.2	5.8	5.7	5.1	5.1
Region Visited						
Southeast	6.3	6.2	6.1	5.9	5.7	5.5
Southcentral	6.2	6.0	5.8	5.7	5.3	5.2
Interior/North	6.3	6.0	5.8	5.7	5.3	5.2
Southwest ⁴	6.2	6.2	5.4	5.8	5.5	5.1
Denali/McKinley	6.3	6.2	5.9	5.8	5.3	5.3

¹ Ratings in bold and italic type represent differences that are statistically significant.

² Highway mode includes personal vehicles only. Not included are motorcoaches and trucks.

³ Inde-Package visitors are independents who purchased sightseeing tours during their trip.

⁴ Caution: Small Sample Sizes

Implications

These findings suggest the Alaska visitor experience is still a very positive experience for the vast majority of visitors. In fact, the unsolicited comments from the Visitor Opinion Survey (VOS) support this notion. However, these findings also suggest the overall visitor experience is beginning to show some signs of less satisfaction than in previous years.

The explanation for the changes in Alaska's satisfaction ratings is likely due to a combination of issues. To further understand these findings, it is important to review the growth of the visitor industry, as well as other recently conducted studies.

The number of visitors to Alaska during the summer months has grown over 50% since Summer 1985, 36% since Summer 1989. Vacation/Pleasure visitor numbers have nearly doubled since Summer 1985, growing 87%. The bulk of this growth has occurred since Summer 1989, just under 12% annually. This rapid rate of growth is characteristic of an emerging destination. When destinations are in a rapidly growing phase, often the market develops more quickly than the infrastructure. As a result, the infrastructure may be strained in some areas. This could be the case in some parts of Alaska.

The conclusions reached in the 1992 Alaska Visitors Association sponsored year-long study, *Destination: Alaska*, support this notion. The consultants reached the following conclusion:

"The seasonal volume tourism already strains some ports-of-call, transportation systems, and visitor-serving facilities. Peak visitor presence at some scenic recreational destinations also tends to erode the quality of vacation experiences. Future expansion of visitation to Alaska will require continued expansion of the 'season', a parallel expansion of the state's infrastructure, and the development of new visitor destinations."

The study further discusses the relationship between the quality of the visitor experience and the number of visitors. One concept of "carrying capacity" suggests the upper limit on the number of visitors is that point where the expected visitor experience begins to deteriorate.

The relationship between the rapidly growing visitor volume and a slower growing infrastructure may provide one explanation for the lower overall ratings in Summer 1993. Changing market expectations about the destination is another possible explanation. Alaska has been successfully marketed as a tourism destination drawing from a large pool of potential visitors. As the market expands it becomes more varied and begins to draw from a wider variety of individuals. In addition, the demographics of Alaska's market are slowly changing. The post-war baby-boomers are beginning to emerge into the prime target age group for Alaska visitors. The generation before the baby-boomers (age 50 to 65) are currently in the prime market group. The attitudes, values and perception of both these groups, particularly as they relate to travel, are somewhat different from the generation preceding them. Understanding and responding to these attitudes and values will be very important for Alaska's visitor industry.

Clearly the State and the visitor industry must pay attention to the supply side of the equation. Tourism marketing entities, such as the Division of Tourism and the Alaska Tourism Marketing Council, may want to learn more about how the market is changing and prepare marketing efforts accordingly.

All in all, Alaska has been successfully marketed as a unique tourism destination. The future challenge is to continue to expand the market and deliver a consistently high-quality product that meets or exceeds market expectations.

Trip Planning Trends and Implications

Alaska visitor trip planning timelines are similar to previous years, and visitors make their trip arrangements in a variety of ways.

The decision to visit Alaska is generally made well in advance of traveling to the state. In 1993, the "When Alaska?" decision was made, on average, a little closer to departure than in previous years, but still many months ahead of travel. Trip arrangements continue to be made well in advance, four to five months on average.

Considerable differences in planning timelines exist among Package, Independent and Inde-Package visitors. Interestingly, the Inde-Package visitor decides to visit Alaska further in advance, on average, than any other group – 9.4 months. Package visitors average 7.4 months, while Independents average 6.2. Once the trip decision is made, Package visitors book their trips closer to their decision, an average 5.4 months, while Inde-Package and Independents book 4.4 and 4.3 months, respectively.

Among Vacation/Pleasure visitors, fully half purchase a package in advance for their entire Alaska trip. Another 10% purchase a prepaid package for a portion of their trip and make independent travel arrangements. The remaining 40% did not purchase a prepaid package for any part of their trip, although one-third of these visitors did purchase tours while in the state. A travel agent is involved in some aspect of trip planning for nearly three-quarters of these visitors.

This information provides important direction for placement and timing of marketing activities. For example, marketers of travel products purchased by Inde-Package visitors, such as hotels, local sightseeing, or activities, understand their market decides far in advance of their trip but waits to make travel arrangements. This means that these marketers need to be active in the marketplace early in the decision process, so that potential visitors can plan to visit their area, as well as later in the decision process, so that these potential visitors can include these products in their plans.

To challenge these marketers even further, this type of visitor may make reservations in advance, or may wait until they are in Alaska before purchasing the product. A presence within the Alaska market is then also necessary to reinforce the earlier messages and capture those who have not made reservations before traveling.

Alaska Trip Planning Timeline Trends
Summer 1985, 1989 and 1993
Average # of Months
All Visitors/Vacation/Pleasure Visitors

	1985		1989		1993	
	All	VP ¹	All	VP	All	VP
"When Alaska?" Decision	7.5	8.3	8.1	8.3	7.3	7.9
Trip Arrangements Made	3.8	4.5	4.7	5.0	4.4	5.0

¹ VP is the abbreviation for Vacation/Pleasure visitor.

Travel Agent Use Trends
Summer 1985, 1989 and 1993
% of All Visitors/Vacation/Pleasure Visitors

	1985		1989		1993	
	All	VP ¹	All	VP	All	VP
Didn't Use An Agent At All	42 %	34 %	33 %	28 %	31 %	27 %
Provided Brochures	36	49	42	50	39	49
Booked Cruise/Package Tour	31	47	38	49	38	49
Booked Independent Lodging/Trans.	21	18	19	18	23	19
Recommended Transportation or Trip Type	17	22	22	25	18	21
Recommended Travel Company	9	13	11	13	13	16
Recommended Alaska	4	6	7	9	9	10
Recommended Lodging	7	7	8	8	7	7

¹ VP is the abbreviation for Vacation/Pleasure visitor.

Timing of visitor travel to Alaska is still largely outside the control of travel marketers.

Broad-based marketing programs, such as the Division of Tourism's international marketing or the Alaska Tourism Marketing Council's U.S. and Canadian marketing, are designed to generate considerable awareness and interest in Alaska as a destination. These programs have been so successful, that much of the targeted population dreams of a visit to Alaska someday.

However, while Alaska may be on an individual's list of desirable travel destinations, prompting that individual to make the commitment to visit in any given year continues to be the major challenge of travel marketers. It is important for all Alaska travel marketers to recognize that personal reasons have been and continue to be the driving force behind what prompts someone to visit Alaska in any given year. Such reasons tend to be vague and include family and friend related reasons (e.g. I had the chance to travel with my friend), long time desire, special occasion (e.g. honeymoon, anniversary), timing worked, financial (e.g. had the money finally), and never had been there.

Personal reasons appear to be cited more often in 1993 than in previous years. The marketing challenge for Alaska, its destinations and travel industry is to find ways to tap into these personal reasons through marketing appeals. Themes that play to the long time desire (e.g. you've always wanted to go) and the timing (e.g. there's no better time than the present) coupled with featuring Alaska's attractions, may create a further sense of urgency needed to make a decision to visit this year.

Main Reason for Trip Decision
Summer 1985, 1989 and 1993
% of All Visitors/Vacation/Pleasure Visitors

	1985		1989		1993	
	All	VP ¹	All	VP	All	VP
Personal Reasons	31 %	44 %	32 %	40 %	43 %	54 %
Business	16	-	6	-	14	-
Visit Friends/Relatives	22	12	24	12	14	7
Attractions/Appeal of Alaska	7	9	12	13	13	16
Recommended by Others	5	6	8	10	6	8
Price/Discount Considerations	-	3	4	4	4	5
Advertising/Promotion	4	7	4	5	2	3
Visit of 50 States	3	4	1	1	<1	<1
Weather	-	-	1	2	<1	<1

¹ VP is the abbreviation for Vacation/Pleasure visitor.

Travel Pattern Trends and Implications

Overall actual length of stay for all Alaska visitors has declined steadily, while it has varied for Vacation/Pleasure visitors.

The average trip length for a Vacation/Pleasure visitor has been between nine and ten nights since AVSP began in 1985. Package visitors average seven nights, while Inde-Package visitors stay twice as long – 15 nights. Independents stay 11 nights, on average.

The average length of an Alaska trip for VPs (and the travel type subgroup) is likely to remain in this range, in spite of the remarkable growth of seven-day cruises in Alaska and the continued national trend toward shorter vacations. This is due to the size of the state and the distance from most of the market. Apart from the seven-day cruise market, which is slated to continue on a rapid growth curve, the other visitor types (cruise/tour, independents, etc.) tend to plan longer excursions to Alaska to see as much of the state as possible. These other visitor types have also grown rapidly in the past, and will likely continue to do so in the foreseeable future.

Actual Length of Stay
Summer 1985, 1989 and 1993
Average # of Nights

	1985		1989		1993	
	All	VP	All	VP	All	VP
Average # of Nights	11.4	9.9	10.9	9.2	9.8	9.5

Regional market share of visitors has varied little over the study years with the exception of the Interior/Northern region.

As the Alaska visitor industry continues to grow, each region of the state continues to capture a relatively similar share of the market, with one exception. The Interior/Northern region has lost market share since 1985. However, overall visitor numbers for the region continue to climb, although not as rapidly as other regions. One possible explanation for Interior's slower growth rate include a slower growing infrastructure than Southeast or Southcentral, where port and infrastructure development has been rapid.

Little change is seen in the list of the ten most-visited communities. Some shifting in ranking has occurred since 1985. Fairbanks has fallen from number four in 1985 to number eight in 1993. The surge of growth in Ketchikan and Skagway is evidence of the fast-growing cruise industry. Unless new areas are developed for visitors, or existing areas dramatically expanded, these visitation patterns are likely to continue in a similar fashion in the near future.

It is important to note that Alaska has been and continues to be largely a touring destination, with visitors generally visiting a variety of communities and more than one region, rather than staying put in one area. This is the mark of a relatively young destination. The large number of visitors touring the state, whether Package or Independent, afford marketers of travel products the additional opportunity to reach their market en route. Understanding these travel patterns is key for promotional activities.

Regions Visited Trends
Summer 1985, 1989 and 1993
% of All Visitors

	1985	1989	1993
Southeast	60%	60%	60%
Southcentral	66	69	68
Interior/Northern	44	35	35
Southwest	7	8	6
Denali/McKinley	33	34	36

Ten Most Visited Communities
Summer 1985, 1989 and 1993
% of All Visitors

	1985	1989	1993
Anchorage	65%	66%	65%
Juneau	53	48	49
Ketchikan	40	44	47
Skagway	32	36	38
Denali/McKinley	33	34	36
Glacier Bay	36	32	32
Fairbanks	38	30	31
Seward	20	24	30
Sitka	32	24	28
Palmer	23	21	20

Chapter I: Statewide Overview of All Visitors



Chapter I: Statewide Overview of All Visitors

Visitor Opinions

Visitor Travel Patterns

Visitor Trip Planning

Demographics

Visitor Opinions

Overall Alaska Trip Ratings

On a scale of 1 (poor) to 7 (excellent), visitors rated their overall experience high at 6.1, slightly lower than in 1989. More than three-quarters (77%) of visitors awarded ratings of 6 or 7; less than 1% gave a rating of 3 or less. Approximately one-half of visitors traveling by the Alaska Marine Highway (Ferry) or Cruise Ship gave the highest ratings to their overall trip experience. Almost one-half (47%) of those Visiting Friends and Relatives (VFRs) and 44% of Vacation/Pleasure visitors (VPs) felt their trip was excellent.

Cruise Ship, VFRs, and visitors from Great Britain said their trips exceeded expectations, with average ratings around 6.0. The statewide average was 5.7, again slightly lower than in 1989. However, almost one-third (31%) of visitors felt their trip exceeded their expectations at the highest level, awarding a rating of seven.

Despite the 5.3 average rating evaluation of their Alaska trip in terms of value for money, almost one-half (48%) of visitors gave ratings of 6 or 7. Only 1% gave the worst rating. The highest ratings were awarded by Cruise Ship, Vacation/Pleasure, and visitors from Great Britain. The lowest average ratings were indicated by Business Only travelers. This may be a result of the difficulty in making short notice travel arrangements during the summer season.

Graph I-A

**Average Alaska Trip Ratings
All Visitors - Summer 1993**

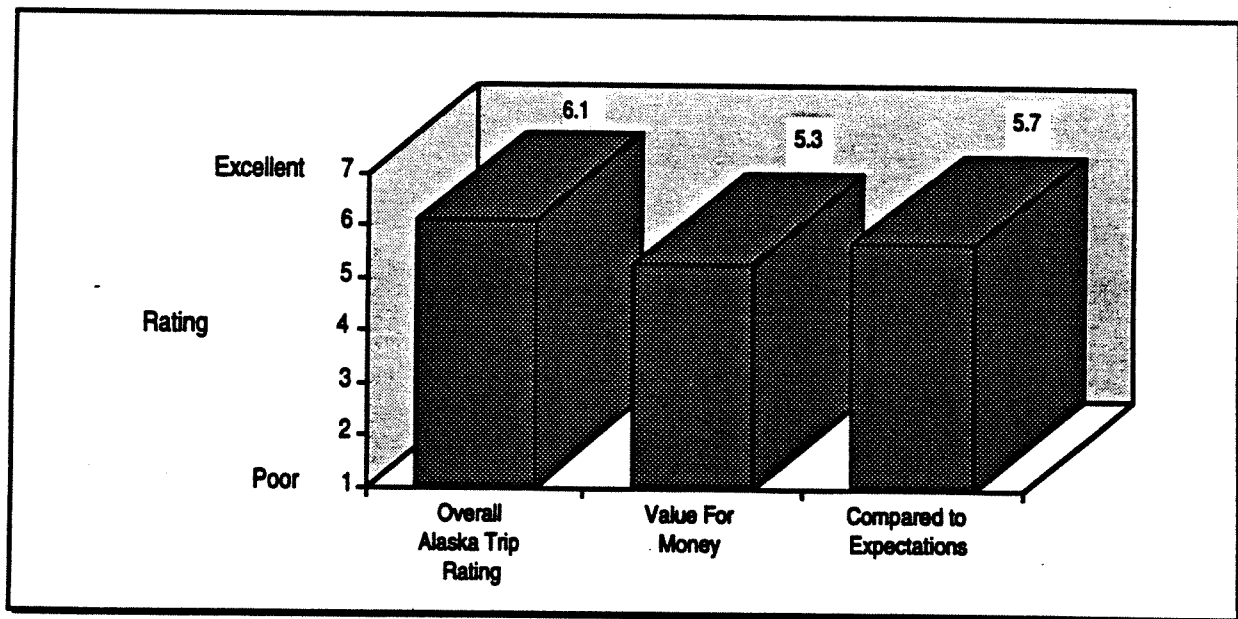


Table I-A

Average Alaska Trip Ratings - By Visitor/Trip Characteristics **All Visitors - Summer 1993**

(1 = Poor and 7 = Excellent on 1 to 7 Scale)

Visitor/Trip Characteristics	Overall Alaska Trip Rating	Value For Money	Compared To Expectations
Total	6.1	5.3	5.7
Trip Purpose			
Vacation/Pleasure	6.2	5.4	5.9
Visiting Friends & Relatives	6.3	5.2	6.0
Business & Pleasure	5.8	5.1	5.4
Business Only	5.3	4.7	5.0
Entry Mode			
Domestic Air	6.0	5.1	5.6
Cruise Ship	6.3	5.9	6.0
Highway ¹	6.0	5.0	5.5
Ferry	6.2	5.1	5.8
International Air	6.2	5.0	5.7
Mode Use			
Domestic Air	6.0	5.2	5.7
Cruise Ship	6.3	5.8	6.0
Highway	6.0	5.0	5.5
Ferry	6.3	5.2	5.9
International Air	5.9	5.0	5.5
Intended Travel Type			
Package	6.2	5.7	5.9
Independent	5.9	5.0	5.6
Inde-Package ²	6.2	5.1	5.7
Origin			
United States Total	6.1	5.3	5.8
West	5.9	5.3	5.6
California	6.0	5.3	5.7
Washington	5.7	5.0	5.4
South	6.1	5.4	5.9
Midwest	6.2	5.3	5.9
East	6.3	5.4	5.9
Canada	5.9	5.3	5.6
Overseas	6.3	5.3	5.8
Germany/Switzerland/Austria	6.4	5.1	5.6
Great Britain	6.5	6.0	6.1
Japan	5.8	4.8	5.3
Australia/New Zealand	6.4	5.4	5.9

¹ Highway mode includes personal vehicles only. Not included are motorcoaches and trucks.

² Inde-Package visitors are independents who purchased sightseeing tours during their trip.

Value for the Money Ratings

Visitors rated nine aspects of the overall trip rating as to value for the money on a 1 (poor) to 7 (excellent) scale. People (friendliness/helpfulness) and sightseeing/attractions were rated the best values (6.1 and 5.8 respectively). Restaurants and accommodations received the lowest average ratings of 4.9 and 5.1. Transportation and activities were rated either 5.4 or 5.3 on the average.

Four out of ten visitors gave the highest marks for friendliness/helpfulness (43%) and more than one-third (36%) awarded ratings of 7 to sightseeing/attractions. Only 15% of visitors rated restaurants as excellent and 17% gave accommodations an excellent mark of 7.

Visitors from Great Britain tended to see Alaska as a good value for the money in almost every category, as opposed to visitors from Japan who tended to give lower ratings. The international traveler may be more experienced and accustomed to premium experiences, facilities and food. Business visitors were also more critical, again a reflection of travel experience.

Cruise Ship visitors and Package visitors (most of whom use a cruise ship) gave high average value ratings. Among mode use groups, Highway and International Air visitors were among the least satisfied.

Graph I-B

Value for Money Ratings Accommodations, Services and Activities All Visitors - Summer 1993

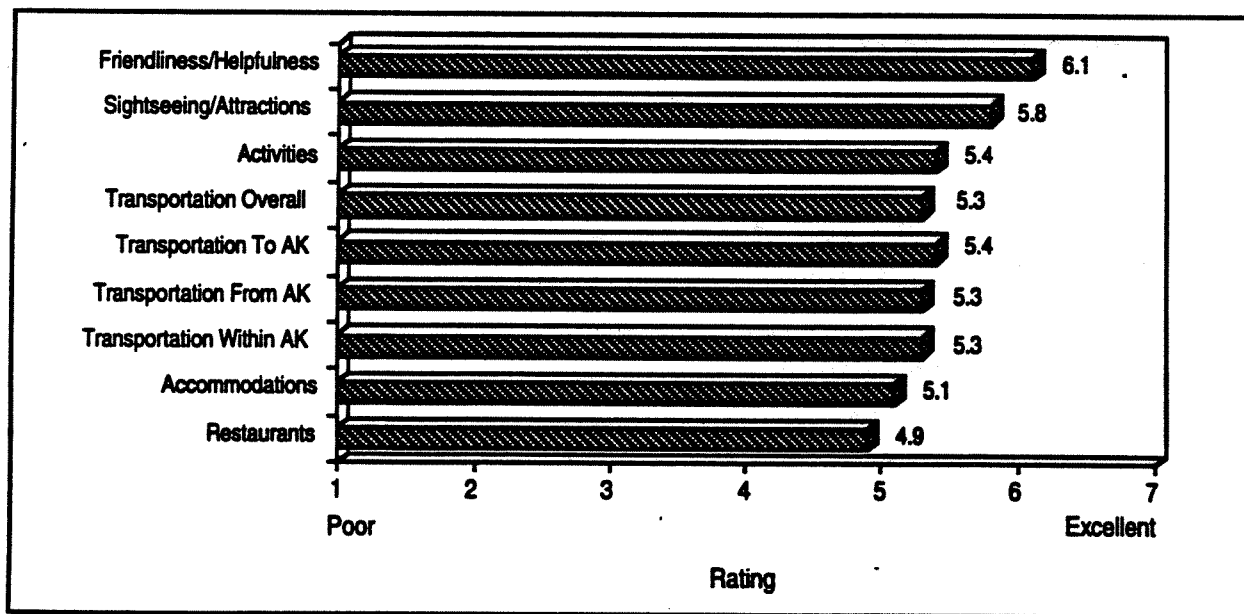


Table I-B

Value for the Money Ratings
Accommodations, Services and Activities
All Visitors - Summer 1993
(1 = Poor and 7 = Excellent on 1 to 7 Scale)

	Friend- liness/ Helpful- ness	Sight- seeing/ Attrac- tions	Activ- ities	Transpor- tation Overall	Transpor- tation To	Transpor- tation From	Transpor- tation Within	Accom- moda- tions	Res- tau- rants
Visitor/Trip Characteristics									
All Visitors	6.1	5.8	5.4	5.3	5.4	5.3	5.3	5.1	4.9
Trip Purpose									
Vacation/Pleasure	6.2	5.9	5.5	5.5	5.4	5.4	5.4	5.2	5.1
Visiting Friends & Relatives	6.0	6.0	5.4	4.9	5.2	5.2	5.0	5.1	4.5
Business & Pleasure	5.9	5.6	5.3	5.1	5.4	5.4	5.0	4.7	4.8
Business Only	5.6	5.6	5.0	4.6	5.1	5.1	4.7	4.4	4.4
Mode Use									
Domestic Air	6.0	5.8	5.4	5.2	5.4	5.4	5.2	5.0	4.8
Cruise Ship	6.3	5.8	5.6	5.8	5.7	5.7	5.8	5.6	5.4
Highway ¹	6.0	5.8	5.3	4.6	4.4	4.4	4.8	4.6	4.7
Ferry	6.0	5.9	5.2	5.1	5.3	5.1	5.1	4.7	4.8
International Air	6.1	5.5	4.9	4.9	4.8	4.8	4.9	4.9	4.6
Travel Type									
Package	6.3	5.9	5.6	5.8	5.7	5.6	5.7	5.5	5.3
Independent	5.9	5.8	5.2	4.9	5.2	5.2	4.9	4.7	4.6
Inde-Package ²	6.1	5.8	5.5	4.8	4.8	4.8	4.9	4.6	4.7
Origin									
United States Total	6.1	5.9	5.5	5.3	5.4	5.4	5.3	5.1	4.9
West	6.0	5.8	5.5	5.2	5.4	5.4	5.2	4.9	4.9
California	6.1	5.9	5.6	5.2	5.5	5.5	5.3	4.9	5.0
Washington	5.6	5.7	5.2	5.1	5.3	5.3	4.8	4.6	4.6
South	6.2	5.8	5.5	5.3	5.4	5.4	5.4	5.2	4.8
Midwest	6.1	5.9	5.3	5.3	5.2	5.2	5.2	5.1	5.0
East	6.3	5.9	5.7	5.5	5.5	5.5	5.7	5.3	5.2
Canada	6.0	5.7	5.2	5.6	5.4	5.3	5.4	5.2	4.9
Overseas	6.2	5.8	5.3	5.0	4.8	4.8	5.1	4.9	4.9
G/S/A ³	6.2	5.7	4.8	4.9	4.7	4.6	5.1	4.7	4.5
Great Britain	6.3	6.1	5.9	5.6	5.7	5.6	5.6	5.5	5.3
Japan	5.8	5.7	5.5	4.4	4.4	4.5	5.1	4.5	4.7
Australia/ New Zealand	6.3	5.6	5.1	5.5	5.1	4.8	5.2	4.7	5.2

¹ Highway mode includes personal vehicles only. Not included are motorcoaches and trucks.
² Inde-Package visitors are independents who purchased sightseeing tours during their trip.
³ Germany/Switzerland/Austria

Likelihood of Visiting Alaska Again And Recommending Alaska

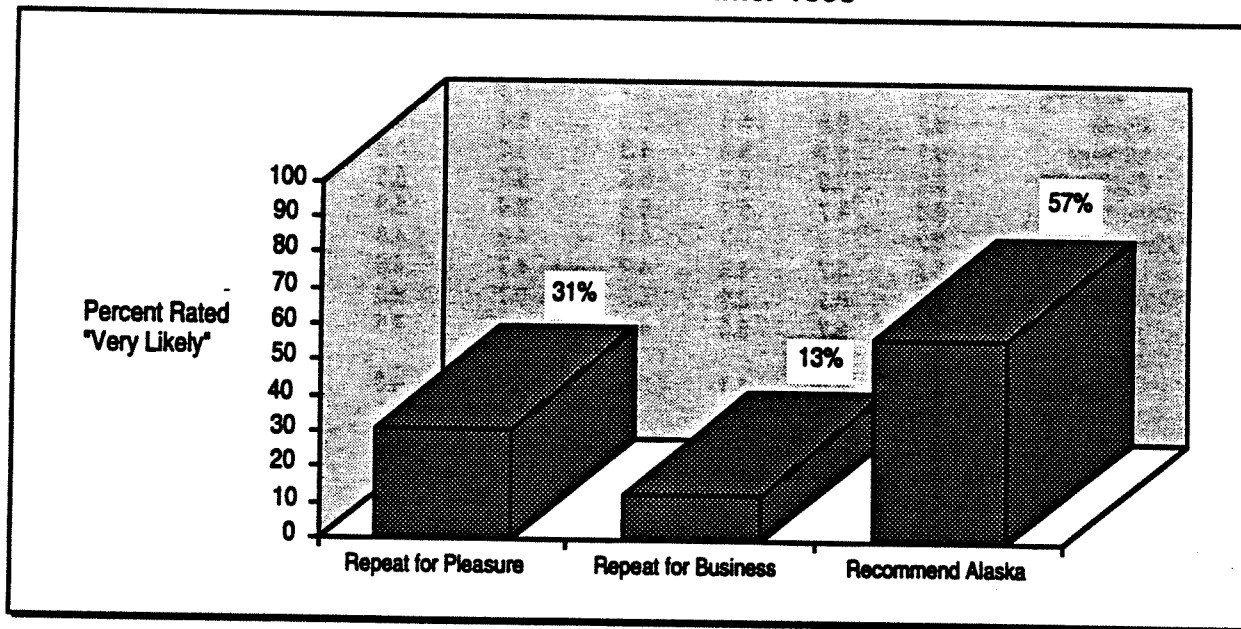
On a scale of 1 (very unlikely) to 7 (very likely), visitors were asked how likely they were to return to Alaska for pleasure and for business within the next five years. Almost one-third (31%) of visitors felt it was "very likely" they would visit Alaska again for pleasure. In fact, forty-six percent (46%) of all visitors indicated it was "quite likely" to "very likely" (ratings of 6 and 7) they would return on a pleasure trip. Four in ten visitors entering by International Air and by Highway said it was "very likely" they would return to Alaska on a pleasure trip. Six in ten of those visiting their friends and relatives expected to return to Alaska within five years.

Interestingly, thirteen percent (13%) of visitors said it was "very likely" they would return to Alaska on business. The majority (65%) felt it was "very unlikely" they would return on business. This is probably related to the unpredictability of business travel.

Most visitors (85%) said it was "quite likely" to "very likely" they would recommend Alaska to friends, relatives and business associates. There were numerous comments in which visitors indicated how highly they recommend Alaska as a vacation site. Many visitors indicated it was their friends' recommendations which encouraged them to visit Alaska.

Graph I-C

**Likelihood of Visiting Alaska Again
And Recommending Alaska
All Visitors - Summer 1993**



Misconceptions About Alaska

When asked "What is the biggest misconception you had about Alaska that was cleared up by your trip?", visitors said "Weather". Nearly one-half (46%) found the weather to be better than expected. Almost two-thirds (64%) of visitors said their perceptions improved during their visit. The summer of 1993, however, broke a number of heat records throughout the state. Some visitors commented on the lack of air conditioning.

Most pleasantly surprised by the weather (and probably the least knowledgeable about Alaska) were the visitors from Overseas and those from the Eastern section of the United States. Yet, almost one-half (47%) of visitors from the Western part of the United States found the weather to be better than expected.

Of those visitors with misconceptions cleared up by their trip, 12% thought Alaska was "worse" than expected. Most visitors were disappointed by not seeing as much wildlife as they expected. Some overseas visitors (10%) felt the state was more crowded than they thought it would be.

Table I-C

Biggest Misconception Cleared Up By Visit to Alaska All Visitors - Summer 1993

Better Than Expected	64%
Weather	46
State Bigger Than Thought	5
Appeal of Alaska/Attractions	6
Roads	4
Accommodations/Transportation Facilities	2
Prices/Cost	2
Friendlier	1
Other	2
Different Than Expected	20%
Worse Than Expected	12%
Appeal of Alaska/Attractions	10
Prices/Cost	1
Accommodations/Transportation Facilities	<1
Roads	1
Weather	<1
Other	2

What Did You Plan To Do In Alaska That You Did NOT Do?

Visitors were asked what they planned to do during their trip that they did not do. More than one-quarter replied they wanted to visit additional towns or areas, but did not. Visitors mentioned that the state is bigger than they expected and this may be the reason for the inability to visit other areas. One-third of visitors from the East and 58% of visitors from Great Britain wished they could have visited more of the state.

Nearly 20% of visitors wanted to go fishing but were unable to do so. Fishing is a popular recreational activity for Alaskan visitors, however advance planning is often necessary to include it on a trip. Almost 60% of the visitors from Japan wanted to go fishing but were unable to do so. Other recreational activities, such as hiking, kayaking and rafting were mentioned by 10% of visitors.

This question may be important in specifying some of the reasons visitors return to Alaska. After their trips, visitors are more aware of the sights and activities they were unable to participate in and these may serve as influential factors into their return to the state.

Table I -D

What Did You Plan To Do In Alaska That You Did NOT Do? All Visitors - Summer 1993

Planned To Do While In Alaska, But Did NOT Do:	Percent of Visitors
1. Include Additional Towns/Areas	27%
2. Fish	19
3. See Additional Attractions/Day Trips	16
4. Do Recreational Activities	10
5. See Wildlife	9
6. Flightsee	8
7. Take Train	2
8. Change Length of Stay or Budget Time Differently	1
9. Make Specific Purchases/Shop in General	1
10. Take Ferry	1
11. Enjoy Night life/Entertainment	<1
12. Other	6

What Did You Do In Alaska That You Had NOT Planned To Do?

Visitors were asked what they did during their trip that they had not planned to do. More than one-quarter (29%) of visitors saw additional attractions or went on day trips. This was most prevalent among visitors from the South, Canada and Great Britain.

Other visitors were able to include recreational activities into their trips that were not previously planned. This was especially true for Overseas visitors; nearly one-quarter of them added some form of recreational activity to their trip plans.

Overseas visitors were also most likely to add flightseeing to their trip plans. Visitors from the Yukon added towns/areas to their visits. Most interesting was the number of visitors from Australia/New Zealand (46%) who added shopping to their plans.

Table I-E

What Did You Do In Alaska That You Had NOT Planned To Do? All Visitors - Summer 1993

Did NOT Plan To Do While In Alaska, But Did Do:	Percent of Visitors
1. Saw Additional Attractions/Day Trips	29%
2. Added Recreational Activities	18
3. Went Flightseeing	13
4. Visited Additional Towns/Areas	7
5. Went Fishing	6
6. Made Specific Purchases/Shop In General	5
7. Enjoyed Night life/Entertainment	3
8. Saw Wildlife	2
9. Changed Length of Stay/Budgeted Time Differently	2
10. Rode the Train	1
11. Went on the Ferry	<1
12. Went Wilderness Camping	<1
13. Other	13

Visitor Travel Patterns

Readers should note that minor differences in entry, exit, and mode market data exist between this publication and *Alaska Visitor Arrivals, Summer 1993*, (see Entry/Intended Exit Transportation Mode on pages 42 and 43). The data below is more accurate since it is a record of actual behavior made after the trip while arrival data was expected behavior upon arrival in Alaska.

Entry and Exit Modes

The most common means of entry into Alaska for all visitors is Domestic Air. More than one-half of all visitors enter by that mode and almost one-third enter by Cruise Ship. One in eight enter by Highway while one in twenty come by either the Alaska Marine Highway (Ferry) or International Air. Exit patterns closely mirror entry patterns.

Table I-F

Entry and Exit Modes (Excludes Seasonal Workers) All Visitors - Summer 1993

Mode	Entering Visitors	Percent	Exiting Visitors	Percent
Domestic Air	443,600	53%	454,400	54%
Cruise Ship	247,000	30	227,700	27
Highway ¹	104,000	12	103,200	12
Ferry	29,100	3	31,300	4
International Air	13,300	2	16,700	2
Other	-	-	600	<1
Unknown	-	-	3,100	<1
Total	836,900	100%	836,900	100%

¹ Highway mode includes personal vehicles only. Not included are motorcoaches and trucks.

Total Mode Market

Perhaps more important to marketers than entry and exit mode totals is the total number of visitors using each transportation mode. This is the total number of visitors using a particular mode either to enter Alaska, exit Alaska, or both. This number better defines the total market using each mode. For example, the total market of Alaska Marine Highway (Ferry) users was 50,900 a far larger number than the 29,100 who simply entered the state on that mode. This means the ferry market was about 5% of all visitors, not 3%.

More than one-half of the market used Domestic Air for entry, exit or both. Cruise Ship users were nearly one-third of the market. Eleven percent (11%) of the market used the Highway mode while one in twenty used the Alaska Marine Highway. International Air was the least used transportation mode.

The majority of visitors enter and exit by the same mode but significant portions of each market changes modes. The majority (82%) of the total visitors in the Ferry market changed modes, as did more than one-half (51%) of the visitors in the Cruise Ship market. Another 47% of visitors who used International Air changed modes and more than one-third of visitors on Domestic Air. More than one-quarter of all visitors in the Highway market changed modes.

Table I-G

Mode Market Size (Excludes Seasonal Workers) All Visitors - Summer 1993

Mode	Entering Visitors Only	Exiting Visitors Only	Visitors Entering and Exiting	Total Mode Markets
Domestic Air	89,300	100,100	354,300	543,700
Cruise Ship	89,800	73,100	154,600	317,500
Highway ¹	17,400	17,100	86,100	120,600
Ferry	19,600	21,900	9,400	50,900
International Air	2,900	6,300	10,400	19,600

¹ Highway mode includes personal vehicles only. Not included are motorcoaches and trucks.

Visitor Travel Type

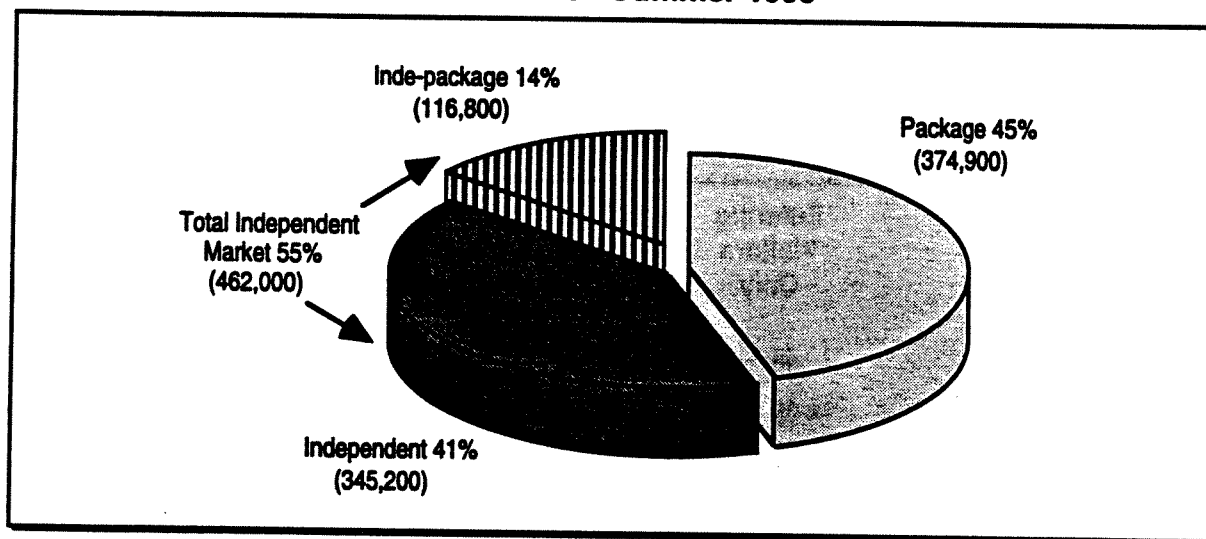
The majority of Alaska visitors (55%) traveled as Independents, not on a prearranged package tour. However, one-quarter of these Independents actually purchased sightseeing tours once they arrived in Alaska. These visitors are defined as Inde-Package visitors, meaning their basic trip was arranged independently but part of their actual Alaska experience included purchasing sightseeing tours instate, usually day and overnight tours, day cruises, or flightseeing.

Although the total Independent market represents about the same proportion of the visitor market as in 1989, the number of Independent visitors increased by one-third. Many of the Inde-Package visitors who intended to purchase sightseeing tours, as evidenced by the visitor arrival information, did not make such purchases. As previously noted, some visitors were unable to take in additional attractions and areas during their trip.

Package visitors 1993 were a slightly larger portion of the market than in 1989, increasing from 42% to 45%. A wide variety of package tours were offered during Summer 1993 with a number of price advantages in travel to Alaska.

Graph I-D

**Visitor Travel Type
All Visitors - Summer 1993**



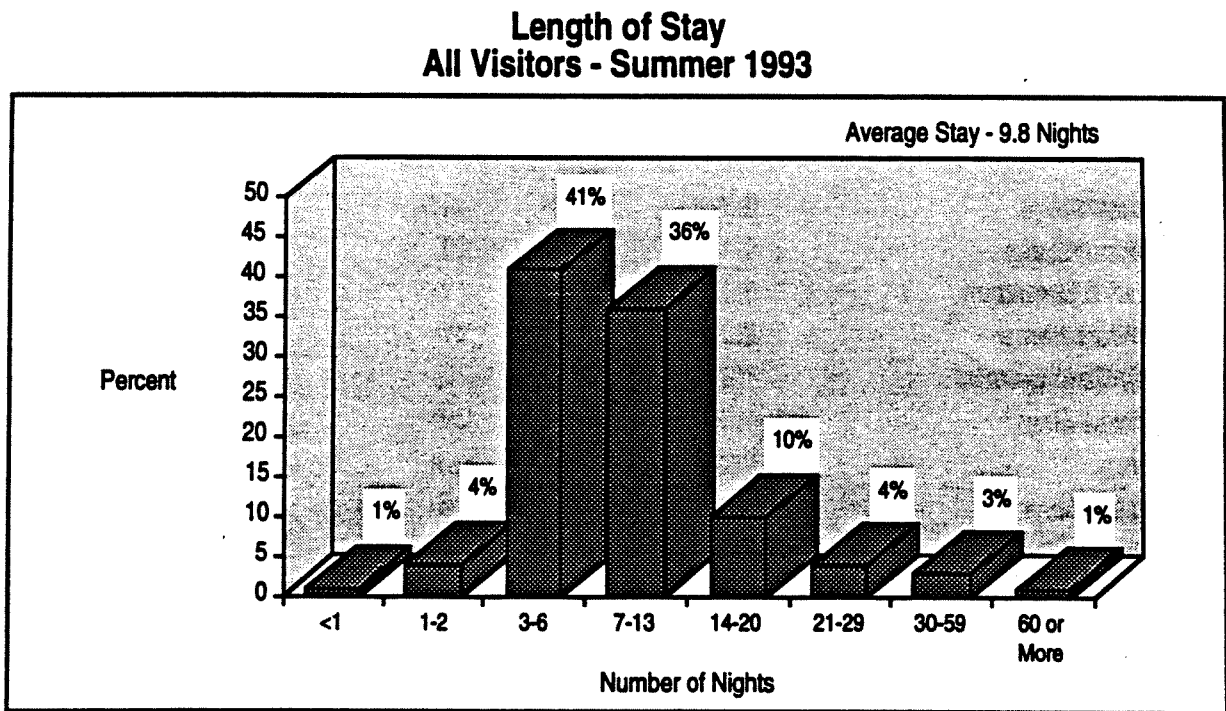
Length of Stay

The average Alaska visitor stayed ten nights, a full night less than in 1989. This may reflect a trend toward shorter but more frequent vacations. The slight increase in Package visitors may account for this change based on the growth of cruise volume and cruise itinerary length (generally spending four to seven nights in Alaskan waters).

While 46% of visitors stayed six nights or less, 50% stayed seven to twenty-nine days. Those Visiting Friends and Relatives (VFRs) accounted for a good portion of this extended stay, averaging 14.3 nights. Visitors using the Alaska Marine Highway (Ferry) had the highest average stay of 16 nights, followed by Highway users at almost 15 nights and visitors using International Air (14 nights). Business Only visitors averaged eight nights, with only Cruise Ship visitors staying less time (6.8 nights).

Among the non-U.S. origin groups, European visitors stayed the longest, averaging almost 11 nights, while Canadian visitors stayed the shortest (6.2 nights), particularly our Yukon neighbors (3.3). However, visitors from Canada tend to make more frequent visits to Alaska than any other group. Within the United States, visitors from the Midwest stayed the longest at almost 13 nights, followed by those from Florida and Washington. However, visitors from Washington tend to visit Alaska more frequently than other U.S. residential groups.

Graph I-E



Lodging Type

Nearly one-half of Alaska visitors (49%) stayed in hotels/motels. Almost four in ten (39%) visitors stayed on cruise ships, a slight increase since 1989. Approximately one-fifth of all visitors stayed in private homes (20%) and resorts/lodges (21%). RV/campgrounds were used by 15% of visitors. Bed and breakfasts experienced some growth since 1989. A new category, wilderness, reflects the growing trend toward alternative lodgings, such as cabins and camping in wild settings.

The average number of nights spent in each type of lodging ranged from two nights in resorts/lodges to a week spent in a wilderness setting to twelve nights in an RV/campground. Cruise ship average stays have dropped by one-half of a night; RV/campground stays have decreased by almost two full nights; and, resort/lodge stays have declined almost one full night in the last four years.

Since 1989, a larger share of the market uses hotels/motels, cruise ships, and bed and breakfasts. Wilderness was not included as a lodging category in the 1989 study. Usage by 8% of all visitors indicates a popular lodging type among all visitors. Visitors staying in private homes and in RV/campgrounds decreased, while resorts/lodges maintained their one-fifth of the market.

Table I-H

Lodging Type All Visitors - Summer 1993

	Average Number of Nights by All Visitors	Percent of All Visitors Using This Lodging	Average Number of Nights Visitors Use This Lodging
Hotel/Motel	2.0	49%	4.1
Resort/Lodge	0.4	20	2.0
Bed & Breakfast	0.3	9	3.3
Private Home	2.2	21	10.5
RV/Campground	1.8	15	12.0
Cruise Ship	1.8	39	4.6
Ferry	0.2	8	2.5
Wilderness	0.6	8	7.5
Other	0.4	5	8.0

Regions Visited

Southcentral accommodated more visitors than any other region. Because of the large population and economic base, this region attracted 80% of those Visiting Friends and Relatives (VFRs) and the business markets. Southeast's second place ranking among regions is enhanced by the large cruise market concentrated there and its ability to attract Vacation/Pleasure visitors.

The Interior/North region attracted the majority of the Highway market, along with Denali/McKinley. Both regions attracted a number of Vacation/Pleasure visitors, particularly those Package visitors who purchased cruise/tours. Southwest, the most remote region, drew special interest visitors. They were primarily resort/lodge sports persons who spend well, but are limited in number. However, over the past four years, wilderness/adventure packages, some of which involve a cruise portion, have been introduced into the Southwest region.

While Southcentral, Southeast and Interior/North have remained steady in their share of the visitor market, Southwest and Denali/McKinley have experienced an increase in overall numbers, but a slight decline in total share since 1989.

Table I-1

Regions Visited All Visitors - Summer 1993

Region	Number of Visitors	Percent of Total Visitors
Southcentral	569,300	68%
Southeast	502,800	60
Denali/McKinley	301,200	36
Interior/North	295,100	35
Southwest	47,100	6
Unknown	5,100	1
Total	836,900	100%

Communities and Places Visited

Anchorage hosted more than one-half million visitors during Summer 1993, a substantial increase compared to Summer 1989. Eight communities received more than one-quarter of a million visitors; eighteen communities received more than 100,000 visitors.

Statewide ranking and market share are shown in Table I-K. Regional groupings and shares are detailed in Table I-L.

In Southeast, Juneau remained the primary port of tourism, although Ketchikan's share has steadily grown. Skagway and Sitka also experienced some growth in overall market share, while Glacier Bay and Haines maintained their shares of the market. A new category, Wilderness Areas, indicated the developing popularity of wilderness/adventure vacations. Ketchikan, Skagway and Sitka continued to develop as popular cruise stops. Additionally, Ketchikan is the entrance point for several outlying fishing resorts as well as for traffic to Metlakatla and Prince of Wales Island.

In Southcentral, Anchorage continued to be a central city for regional and statewide tourism. Seward maintained its status as the second most visited community in Southcentral, followed by Palmer, Kenai and Wasilla. Of particular notice were the eight communities which received a total of more than 100,000 visitors. All but one received more than one-fifth of the regional market.

For the Interior/North, Fairbanks played the primary host role for visitors, seeing 87% of all visitors to the region. Tok, a small community with strong Highway traffic, received one-half of all the visitors to the region and was the only other community to see more than 100,000 visitors. The outlying communities, accessible only by air, maintained their share of the Interior/North market.

The community detail indicated clearly the changes taking place in the Southwest region. Although the sample size was small, survey results suggested these visitation patterns. In 1989, King Salmon and Kodiak received most of the visitor volume. During Summer 1993, the Aleutian Islands received more visitors as they took advantage of various tour options. As a result, the Aleutians more than doubled its regional market share. Katmai, which has a national park with the largest concentration of grizzly bears in the state, has become a popular resort/lodge destination. In 1989, the Pribilof Islands were not part of the community table. Now, this location, noted for its fur seal and prolific bird population, has 7% of the regional market share.

Denali/McKinley also had an increase in the number of visitors and its total market share.

Table I-J

Communities and Places Visited All Visitors - Summer 1993

	Total Visitors	Percent Visiting Community or Place
Total Visitors	836,900	
Anchorage	543,600	65 %
Juneau	408,700	49
Ketchikan	386,900	47
Skagway	318,900	38
Denali/McKinley	301,200	36
Glacier Bay	263,600	32
Fairbanks	257,000	31
Seward	248,100	30
Sitka	234,200	28
Palmer	169,000	20
Kenai	159,800	19
Wasilla	153,400	18
Tok	144,500	17
Homer	134,600	16
Prince William Sound	129,700	16
Soldotna	129,400	16
Valdez	124,300	15
Haines	114,300	14
Glennallen	104,800	13
Whittier	83,600	10
Other Kenai Peninsula Communities	65,900	8
Wrangell	56,400	7
Petersburg	37,900	5
Southcentral Wilderness Areas	36,300	4
Nome	23,300	3
Kotzebue	19,000	2
Prudhoe Bay	18,800	2
Southeast Wilderness Areas	18,200	2
Cordova	17,200	2
Aleutian Islands	13,000	2
Interior/North Wilderness Areas	12,800	2
Kodiak	10,700	1
King Salmon	10,300	1
Iliamna	7,300	1
Katmai	6,800	1
Southwest Wilderness Areas	3,700	<1
Barrow	3,500	<1
Pribilofs	3,300	<1
Dillingham	3,200	<1
Bethel	1,400	<1
Other Southcentral Communities	55,300	7
Other Interior/North Communities	36,900	4
Other Southeast Communities	23,900	3
Other Southwest Communities	9,800	1
Unknown	5,100	1

Table I-K

**Communities and Places Visited
By Region
All Visitors - Summer 1993**

	Number of Visitors	% of All Visitors to AK	% of All Visitors To Region
Southeast	502,800	60 %	100 %
Juneau	408,700	49 %	81 %
Ketchikan	386,900	47	77
Skagway	318,900	38	63
Glacier Bay	263,600	32	52
Sitka	234,200	28	47
Haines	114,300	14	23
Wrangell	56,400	7	11
Petersburg	37,900	5	8
Wilderness Areas	18,200	2	4
Other Southeast Communities	23,900	3	5
Southcentral	569,300	68 %	100 %
Anchorage	543,600	65	95
Seward	248,100	30	44
Palmer	169,000	20	30
Kenai	159,800	19	28
Wasilla	153,400	18	27
Homer	134,600	16	24
Prince William Sound	129,700	16	23
Soldotna	129,400	16	23
Valdez	124,300	15	22
Glennallen	104,800	13	18
Whittier	83,600	10	15
Other Kenai Peninsula Communities	65,900	8	12
Wilderness Areas	36,300	4	6
Cordova	17,200	2	3
Other Southcentral Communities	55,300	7	10
Interior/North	295,100	35 %	100 %
Fairbanks	257,000	31	87
Tok	144,500	17	49
Nome	23,300	3	8
Kotzebue	19,000	2	6
Prudhoe Bay	18,800	2	6
Wilderness Areas	12,800	2	4
Barrow	3,500	-	1
Other Interior/North Communities	36,900	4	13
Southwest	47,100	6 %	100 %
Aleutian Islands	13,000	2	28
Kodiak	10,700	1	23
King Salmon	10,300	1	22
Iliamna	7,300	1	15
Katmai	6,800	1	14
Pribilofs	3,300	<1	7
Dillingham	3,200	<1	7
Bethel	1,400	<1	3
Wilderness Areas	3,700	<1	8
Other Southwest Communities	9,800	1	21
Denali/McKinley	301,200	36 %	100 %
Unknown	5,100	1%	
Total	839,900	100 %	

Attractions Visited

Tables I-L (statewide) and I-M (by region) detail visits to Alaska's most popular attractions. In 1989, fifty-eight attractions were listed; this report expanded the list to sixty-four. There have been a few changes in the order of the most visited attractions since 1989. The Inside Passage, which was the second most visited attraction in 1989, was the most visited attraction in 1993, switching places with Portage Glacier. Almost one-half of all visitors to the state (46%) visited the Inside Passage, while more than four of every ten visitors (44%) went to Portage Glacier.

Mendenhall Glacier maintained its status as the third most visited attraction, while Ketchikan Totems became the fourth most visited attraction, in place of Glacier Bay in 1989. More than one-third (36%) of all visitors to the state made it a point to see Denali/McKinley and Skagway (35%), just as they did in 1989. The Anchorage Museum sustained its status from 1989 as the eighth most visited attraction, with more than one-quarter (26%) of all visitors stopping there. The Transalaska Pipeline and Sitka are new to the top ten list of most visited attractions in the state, although in 1989 they were the eleventh and twelfth most visited attractions.

Seven of the top ten most visited attractions had more than 250,000 visitors. Twenty-four of the attractions around the state were visited by more than 100,000 visitors.

The top attractions in the Southeast region are heavily visited by cruise passengers, such as the Inside Passage, Mendenhall Glacier, Ketchikan Totems, Skagway, Glacier Bay and Sitka. Southcentral, which attracts a wide variety of travel types, is renown for Portage Glacier, however nine other attractions in the region also had more than 100,000 visitors.

Six attractions in the Interior/North were visited by more than 100,000 visitors. Approximately one in five visitors to the state saw the Transalaska Pipeline, the University of Alaska Fairbanks, Alaskaland, the Alaska Highway and experienced a Chena River Trip.

For the first time, the Aleutian Islands were the most visited attraction in Southwest, with almost one-half (48%) of all visitors to the region. Katmai National Park, noted for its wildlife viewing was visited by almost one-third (31%) of visitors to the region, thus maintaining its second most visited status from 1989 with a significant increase in its market share of Southwest. The Kodiak Russian Orthodox Church, which was the most visited attraction in Southwest in 1989, was third for Southwest yet maintained its market share of the region.

Table I-L

Attractions Visited Statewide All Visitors - Summer 1993

	Number of Visitors To Attraction	Percent of Visitors Visiting Attraction
Total Visitors	836,900	
Attraction		
Inside Passage	387,200	46%
Portage Glacier	370,000	44
Mendenhall Glacier	331,800	40
Ketchikan Totems	331,800	40
Denali/McKinley	301,200	36
Skagway's Historic Gold Rush District	296,700	35
Glacier Bay	256,400	31
Anchorage Museum of History & Art	216,300	26
Transalaska Pipeline	200,700	24
Sitka's Russian Church & Dancers	186,000	22
University of Alaska	183,000	22
University of Alaska Museum	165,300	20
Large Animal Research Station	41,300	5
Agriculture & Forestry (Experimental Farm Station)	17,700	2
Geophysical Institute	8,900	1
Sitka National Historical Park	165,900	20
Prince William Sound	165,100	20
Kenai River	165,100	20
Alaska Highway	156,400	19
Alaska State Museum	145,800	17
Columbia Glacier	136,600	16
Chugach State Park	125,200	15
Resurrection Bay	125,200	15
Valdez Pipeline Terminal	108,200	13
Lake Hood Air Harbor	108,200	13
Alyeska Ski Resort	108,200	13
Chena River Trips	106,200	13
Alaskaland	103,300	12
College Fjord	96,800	12
Gold Panning, Dredges & Saloons	91,500	11
Kenai National Wildlife Refuge	91,100	11
St. Nicholas Russian Orthodox Church and Native Spirit Dancers	91,100	11
Matanuska Glacier	74,000	9

Table I-L Continued

**Attractions Visited Statewide
All Visitors - Summer 1993**

Attraction	Number of Visitors To Attraction	Percent of Visitors Visiting Attraction
Kenai Fjords National Monument	62,600	7
Musk Ox Farm	62,600	7
Misty Fjords National Monument	60,300	7
Potter Point State Game Refuge	51,200	6
Chilkat Bald Eagle Preserve	50,300	6
Kachemak Bay	45,500	5
Crow Creek Mine	45,500	5
Tetlin National Wildlife Refuge	38,400	5
Hot Springs	38,400	5
Transalaska Pipeline Haul Road	35,400	4
Hatcher Pass Recreation Area	34,200	4
Iditarod Museum	34,200	4
Tracy Arm Fjords	25,100	3
Chilkat Dancers	25,100	3
Nome - Gold Rush History	23,600	3
Aleutian Islands	22,600	3
Knik Glacier	22,800	3
Alaska State Fair	22,800	3
Prudhoe Bay Oil Fields	17,700	2
Kotzebue-Eskimo Culture	17,700	2
Independence Mine State Historic Park	17,100	2
Brooks Range	14,800	2
Katmai National Park	14,600	2
Alaska Historical and Transportation Museum	11,400	1
Gates of the Arctic National Park	8,900	1
Russian Orthodox Church	8,900	1
Baranof Museum	8,500	1
Kodiak National Wildlife Refuge	7,100	1
Arctic National Wildlife Refuge	5,900	1
Eaglecrest Ski Area	5,000	1
Fort Abercrombie	3,800	<1
Barrow - Northernmost Point in North America	3,000	<1
Pribilof Islands	2,800	<1

Table I-M

Attractions Visited By Region All Visitors - Summer 1993

	Number of Visitors To Region/Attraction	Percent of All Visitors To Alaska	Percent of All Visitors To Region
Total Visitors	836,900	100 %	
Southeast	502,800	60 %	100 %
Inside Passage	387,200	46	77
Mendenhall Glacier	331,800	40	66
Ketchikan Totems	331,800	40	66
Skagway's Historic Gold Rush District	296,700	35	59
Glacier Bay	256,400	31	51
Sitka's Russian Church & Dancers	186,000	22	37
Sitka National Historical Park	165,900	20	33
Alaska State Museum	145,800	17	29
Misty Fjords National Monument	60,300	7	12
Chilkat Bald Eagle Preserve	50,300	6	10
Tracy Arm Fjords	25,100	3	5
Chilkat Dancers	25,100	3	5
Eaglecrest Ski Area	5,000	1	1
Southcentral	569,300	68	100 %
Anchorage Area	495,300	59	87 %
Portage Glacier	370,000	44	65
Anchorage Museum of History & Art	216,300	26	38
Chugach State Park	125,200	15	22
Lake Hood Air Harbor	108,200	13	19
Alyeska Ski Resort	108,200	13	19
St. Nicholas Russian Orthodox Church and Native Spirit Houses	91,100	11	16
Potter Point State Game Refuge	51,200	6	9
Crow Creek Mine	45,500	5	8
Kenai Peninsula	244,800	29	43
Kenai River	165,100	20	29
Resurrection Bay	125,200	15	22
Kenai National Wildlife Refuge	91,100	11	16
Kenai Fjords National Monument	62,600	7	11
Kachemak Bay	45,500	5	8
Prince William Sound Area	239,100	29	42
Prince William Sound	165,100	20	29
Columbia Glacier	136,600	16	24
Valdez Pipeline Terminal	108,200	13	19
College Fjord	96,800	12	17
Matanuska-Susitna Area	136,600	16	24
Matanuska Glacier	74,000	9	13
Musk Ox Farm	62,600	7	11
Hatcher Pass Recreation Area	34,200	4	6
Iditarod Museum	34,200	4	6
Knik Glacier	22,800	3	4
Alaska State Fair	22,800	3	4
Independence Mine State Historic Park	17,100	2	3
Alaska Historical and Transportation Museum	11,400	1	2

Table I-M Continued

Attractions Visited By Region All Visitors - Summer 1993

	Number of Visitors To Region/Attraction	Percent of All Visitors To Alaska	Percent of All Visitors To Region
Interior/North	295,100	35 %	100 %
Fairbanks Area	262,600	31	89
Transalaska Pipeline	200,700	24	68
University of Alaska	183,000	22	62
University of Alaska Museum	165,300	20	56
Large Animal Research Station	41,300	5	14
Agriculture & Forestry (Experimental Station Farm)	17,700	2	6
Geophysical Institute	8,900	1	3
Chena River Trips	106,200	13	36
Alaskaland	103,300	12	35
Gold Panning, Dredges & Saloons	91,500	11	31
Hot Springs	38,400	5	13
Other Interior Areas	162,300	19	55
Alaska Highway	156,400	19	53
Tetlin National Wildlife Refuge	38,400	5	13
Other Northern Areas	67,900	8	23
Transalaska Pipeline Haul Road	35,400	4	12
Nome - Gold Rush History	23,600	3	8
Prudhoe Bay Oil Fields	17,700	2	6
Kotzebue Eskimo Culture	17,700	2	6
Brooks Range	14,800	2	5
Gates of the Arctic National Park	8,900	1	3
Arctic National Wildlife Refuge	5,900	1	2
Barrow - Northernmost Point in North America	3,000	<1	1
Southwest	47,100	6 %	100 %
Aleutian Islands	22,600	3	48
Katmai National Park	14,600	2	31
Russian Orthodox Church	8,900	1	19
Baranof Museum	8,500	1	18
Kodiak National Wildlife Refuge	7,100	1	15
Fort Abercrombie	3,800	<1	8
Pribilof Islands	2,800	<1	6
Denali/McKinley	301,200	36 %	100 %

Visitor Trip Planning

Alaska Trip Planning Timelines

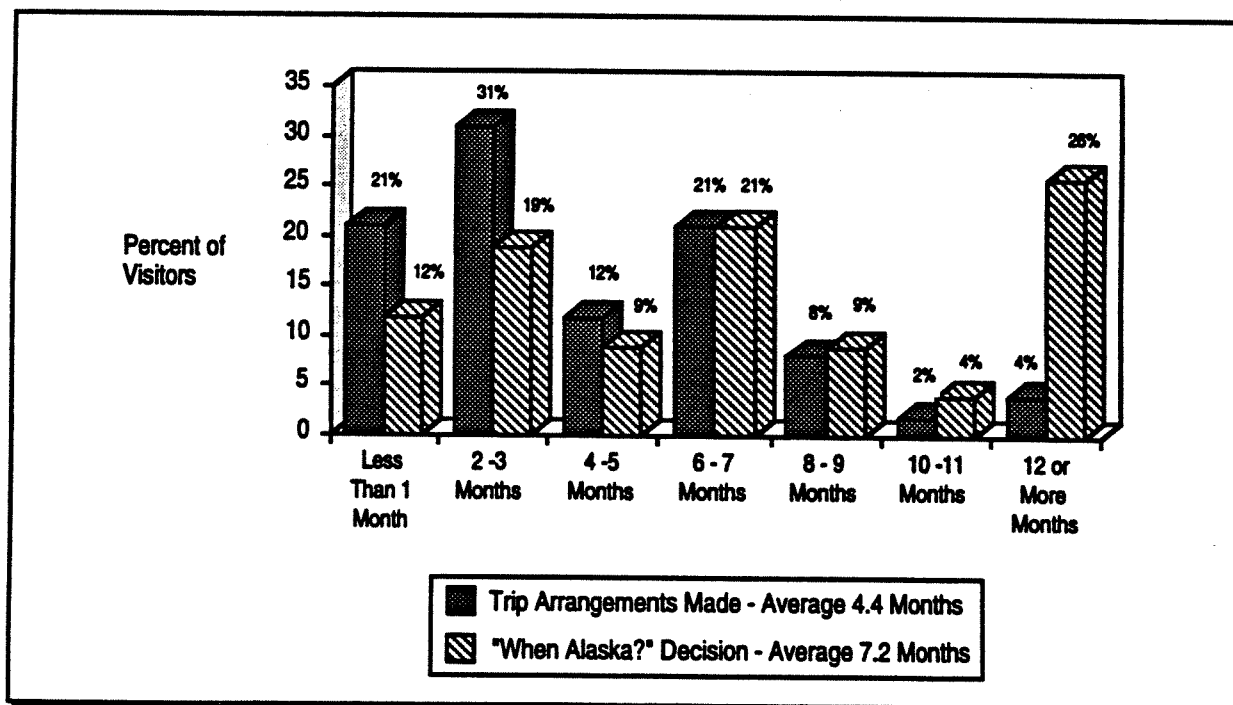
The average Alaska visitor decided to come to Alaska about seven months in advance, a full month earlier than in 1989. Actual trip arrangements were made around four months in advance. These averages, however, do not adequately reflect the wide distribution of actual trip decision and travel arrangement timings.

The Alaska trip decision has definite peaks and valleys. One-quarter of the market decided on their Alaska trip a year or more in advance, well ahead of the marketing season. Since these visitors are already sold on the destination, the trick for marketers is locating them in order to provide trip planning information. Those most likely to decide on Alaska a year or more in advance are the International Air, Highway and Ferry markets, those wishing to visit Southwest and Denali, Overseas travelers, cruise/tour visitors and Easterners. One-fifth of the market decided to come to Alaska six to seven months in advance and one-fifth at two to three months. Few visitors decided on Alaska as a destination 8 to 11 months in advance.

Actual trip arrangement times were more compressed. More than 50% of visitors made their arrangements in three months or less. Another one-third made their arrangements between four and seven months in advance.

Graph I-F

Alaska Trip Planning Timelines
All Visitors - Summer 1993



Trip Arrangements

When it came to making trip arrangements, an equal number of visitors bought packaged trips as those who planned completely independent travel. Other innovative arrangements were available with visitors utilizing packages during their trip, either planned in advance or purchased while instate.

While it is expected that most visitors to Southeast purchased a package trip due to the large cruise market, the same was true for visitors to Denali. Visitors to Southcentral and the Interior were primarily Independent travelers, yet at least one-third of these visitors purchased packages in advance for their entire trip. Almost three-quarter (74%) of visitors to Southwest were Independent travelers.

The frequent visitors from the Yukon (87%) and Washington (65%) travel as Independents. The majority of visitors from Great Britain (71%), British Columbia (62%), Florida (53%) and Australia/New Zealand (52%) bought packaged trips in advance for the entire trip. Visitors from Japan were the most likely to arrive independent but purchase instate tours. Visitors from Great Britain were the most likely to purchase some packaged trip in advance of their arrival.

Table I-N

Trip Arrangements All Visitors - Summer 1993

How Did You Make Arrangements For Your Alaska Trip?	Percent of Visitors
1. Did not buy a packaged trip or instate tour while in Alaska	40%
2. Bought a packaged trip in advance for the entire Alaska trip	40
3. Did not buy a packaged trip in advance for the Alaska trip but bought tours instate	12
4. Bought a packaged trip in advance for some of the Alaska trip	8
5. Other	<1

Alaska Trip Decision Criteria

Visitors were asked why they chose to visit Alaska in 1993 and what factors caused them to come now rather than later. This question focused not on reasons for visiting Alaska, but rather on factors affecting the timing of the visit.

Personal reasons, many of them rather vague, was the most influential factor for four out of ten visitors. The chance to travel with someone important to them helped make the decision for one out of fourteen visitors, just as for those having wanted to visit Alaska for a long time. Many visitors were given cruises or air tickets as gifts for 50th or 25th anniversaries, birthdays or retirement. Business or the chance to visit with friends and relatives made the decision for more than one out of seven visitors.

The attractions and appeal of Alaska was one of the leading reasons of importance to come to the state. The natural beauty of the state, such as glaciers and mountains, is now widely seen on television specials and visitors want to see the real thing. The chance to go fishing is another important reason. Alaska is being recommended by past visitors and persons in the travel business and their words carry weight with potential visitors. Price and discount opportunities also helped make Alaska a more attractive vacation destination.

Choosing Alaska Over Other Destinations

Most visitors decided on Alaska without considering competing destinations. However, about one in four visitors wondered whether to visit Alaska or go to Europe, Canada, Hawaii, Mexico, Australia or some other destination. About 187,000 visitors made a competitive decision in favor of Alaska in 1993. The attractions and appeal of Alaska, along with a variety of personal reasons, carried most decisions in favor of Alaska.

Family and friend related reasons along with the idea that Alaska was a place the visitor had simply never been before were major personal reasons for deciding on Alaska. Visiting friends and relatives was not as much of a factor for many visitors as in 1989. Seeing the natural wonders of the state helped make the decision for as many visitors who had family and friend related reasons. Being able to go fishing was also a very important consideration.

For the first time, the opportunity to participate in adventure travel, descriptive of various wilderness experiences such as kayaking, hiking the Chilkoot Trail, climbing Denali, etc. was added as a factor. Two percent (2%) of visitors came to the state specifically for the chance to have a wilderness experience.

Price and discount considerations were an important factor when Alaska was considered in comparison to other destinations. Even the weather worked in Alaska's favor with some visitors wanting a cooler climate. They were undoubtedly surprised by the record high temperatures during Summer 1993.

Table I-O

Trip Decision Criteria All Visitors - Summer 1993

	Main Reason for 1993 Alaska Trip	Reason for Alaska vs. Other Destinations Considered*
1. Personal Reasons	43%	37%
Family/Friend Related Reasons	7	9
Long Time Desire	7	2
Special Occasion	5	1
Timing Considerations	5	5
Stage in Life	3	2
Financial	2	1
Never Been There	2	6
Group Travel Opportunity	2	1
Wanted to Cruise	1	<1
Other	7	9
2. Business	14	3
3. Visiting Friends & Relatives	14	8
4. Attractions/Appeal of Alaska	13	17
Natural Attractions	8	9
Fishing	5	6
Adventure Travel	<1	2
Other	<1	-
5. Recommended By Others	6	3
6. Price/Discount Considerations	4	8
7. Advertising/Promotion	2	<1
8. Visit All 50 States	<1	-
9. Weather	<1	3
10. Other	4	21

*Of those who chose Alaska vs. other destinations considered.

Competing with Specific Destinations

Europe is Alaska's leading competitor, followed by Canada, Hawaii, and Mexico. The top seven competitors are the same as in 1989. New England took over the eighth position from the Pacific Northwest, which still follows in the ninth position. The South Atlantic states have dropped out of the top ten. China/Hong Kong/Taiwan are new entries into Alaska's competitive market.

Personal reasons, such as being able to travel with family or friends, a long time desire to visit, receiving the trip as a gift, retirement or being financially able to make the trip, were important factors for visitors choosing Alaska over most locations. A number of visitors wanted to see friends and relatives who live in the state. Cost is also listed as a reason for choosing Alaska over the top nine competitors. This implies that Alaska is continuing to be more price competitive with other destinations. The state has long suffered from the perception that prices are high, therefore travel to the state must be costly.

Table I-P

**Why Visitors Chose Alaska Over a Considered Destination
All Visitors - Summer 1993**

Considered Destination	Reason for Choosing Alaska
1. Europe	Personal Reasons, Attractions/Appeal of Alaska, Visit Friends and Relatives, Cost, Recommended by Others
2. Canada	Personal Reasons, Business, Attractions/Appeal of Alaska, Recommended by Others, Cost, Visit Friends and Relatives
3. Hawaii	Personal Reasons, Visit Friends and Relatives, Attractions/Appeal of Alaska, Cost, Business, Recommended by Others
4. Mexico	Attractions/Appeal of Alaska, Recommended by Others, Cost, Personal Reasons, Visit Friends and Relatives
5. Australia/New Zealand	Personal Reasons, Attractions/Appeal of Alaska, Cost, Business, Visit Friends and Relatives
6. California	Personal Reasons, Attractions/Appeal of Alaska, Visit Friends and Relatives, Cost, Business, Weather
7. Caribbean	Personal Reasons, Attractions/Appeal of Alaska, Weather, Cost
8. New England	Personal Reasons, Attractions/Appeal of Alaska, Cost
9. Pacific Northwest	Attractions/Appeal of Alaska, Personal Reasons Visit Friends and Relatives, Cost, Recommended by Other, Business, Weather
10. China/Hong Kong/Taiwan	Personal Reasons, Attractions/Appeal of Alaska
11. South Atlantic States	Visit Friends and Relatives, Personal Reasons, Attractions/Appeal of Alaska, Weather, Business Recommended by Others
12. Midwest States	Attractions/Appeal of Alaska, Personal Reasons, Visit Friends and Relatives, Cost, Recommended by Others

Travel History and Future Preferences of Alaska Visitors

Visitors were asked to provide a five-year travel history as well as where they prefer to travel in the future. Detailed competitive destination data follows in Table I-R.

While one-third of Alaska visitors have been to Europe in the past five years, domestic regions provided competition along with Alaska. California and Florida each hosted about one of every four Alaska visitors. Hawaii was visited by one in every five Alaska visitors, as was the Caribbean. The Eastern and Midwestern portions of the U.S. were visited by significantly more visitors during the past five years than in 1989.

Europe was a popular destination for visitors' last vacation and was Alaska's strongest competitor for visitors' 1993 vacation destination. However, when visitors were asked for both their preferred (where do you want to go?) and their most likely (where will you really go?) vacation destinations, Europe and Alaska were both highly desired. The destination with the largest discrepancy between preference and likelihood of visiting was Australia/New Zealand, just as in 1989. Apparently visitors desire to visit the "Land Down Under", but are not likely to do so on their next vacation.

Travel to other destinations by Alaska visitors is on the rise, whether it be to the Pacific Coast States, Europe, the Caribbean or Mexico. This suggests that Alaska's visitors may be more well-traveled than ever. Alaska is relatively less developed than many of its competing destinations, such as Europe and Hawaii. The experienced traveler who has been to more developed destinations may be more discriminating when it comes to various aspects of their trip. This may account for the overall ratings decline.

Table I-Q

Travel History and Future Preference of Alaska Visitors All Visitors - Summer 1993

	Last Vacation 2,000 + Miles	Past Five Years	Others Considered for 1993	Preferred Next Vacation	Probable Next Vacation
Pacific Coast States	20%	60%	5%	8%	15%
Hawaii	10	20	3	7	8
California	7	25	1	1	4
Washington/Oregon	3	15	1	<1	3
Europe	16	32	6	20	13
Great Britain & Ireland	5	13	1	5	4
France	1	7	<1	1	1
Germany	1	5	<1	1	<1
Caribbean	10	21	2	6	7
Southern U.S. States	10	57	1	2	12
Florida	4	24	1	2	7
Canada	8	21	3	6	6
British Columbia	2	5	1	1	1
Maritime Provinces	2	2	1	1	1
Alberta	1	4	1	1	1
Mexico	7	17	1	2	4
Mountain States	3	43	2	5	9
Arizona	1	11	1	3	2
Nevada	1	7	-	<1	1
Colorado	<1	7	<1	1	1
Utah	1	4	<1	<1	1
ALASKA	3	6	-	20	14
Australia/New Zealand	3	9	1	12	4
Eastern U.S. States	3	16	<1	<1	2
Midwestern U.S. States	1	16	<1	<1	2
China	1	4	<1	1	1
Japan/Korea	1	4	<1	1	<1
S.E. Asia/India	1	3	<1	<1	<1
Israel	1	1	<1	1	1
South Pacific	<1	3	<1	1	<1

Trip Information Sources

Several survey questions were devoted to determining where visitors get their information for planning an Alaska trip. Graph I-H shows responses to an open-ended question asking visitors to remember, without prompting, what sources they used. Therefore, actual use of trip information sources is likely to be slightly higher.

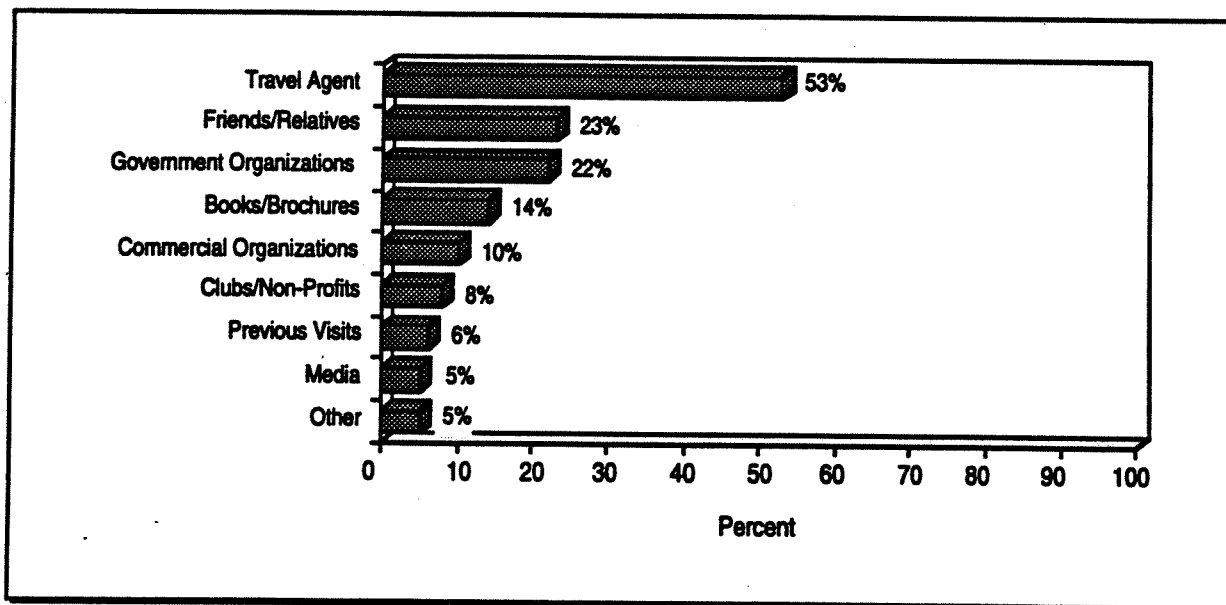
Travel agents were a source of information for more than one-half of the market. Friends and Relatives were the second largest source, along with government organizations. State tourism-related agencies, such as the Alaska Division of Tourism and the Alaska Tourism Marketing Council, were contacted by more than one-fifth of visitors (22%) for information. Books and brochures, which were the second most used source in 1989, was the fourth most used source in 1993. One-fifth (20%) of all visitors used the *State of Alaska Official Vacation Planner*.

Commercial organizations, such as cruise lines, tour companies and airlines, were utilized along with clubs and other non-profit organizations. A full 6% of visitors based their planning on previous visits to the state. Alaska's media efforts seem to be paying off as a source of information for many visitors in planning their trips.

There have been some major changes in how visitors get their planning information. In 1989, government organizations, such as the Division of Tourism, Chambers of Commerce or the Alaska Marine Highway were the least used recognized agencies for trip planning. In 1993, they were used as much as friends and relatives. In 1989, 40% of visitors used books and brochures, compared to 14% in 1993.

Graph I-G

**Trip Information Sources
All Visitors - Summer 1993**



Requesting the State of Alaska Official Vacation Planner

One in five Alaska visitors in Summer 1993 requested the *State of Alaska Official Vacation Planner*. Visitors using the Highway and the Alaska Marine Highway were the most likely to send for the *Planner*. More than one-third of visitors to the Interior and Denali utilized the *Planner*. One in four visitors from the Midwest and the South used the *Planner*, as did Easterners. Almost one in four Independent visitors who purchased sightseeing trips while in Alaska utilized the *Planner*.

Receipt of Unsolicited Brochures on Alaska

Only 16% of visitors received unsolicited brochures on Alaska, but of those who did 31% received six or more pieces. Clearly the industry's marketing efforts are concentrated on only a small portion of the market, but competition for that portion appears intense. The fact that eight out of ten persons receive nothing is a marketing challenge for Alaska visitor businesses. Interestingly, those most likely to receive unsolicited brochures were the Highway and Ferry markets (28% and 26% respectively), Inde-Package visitors (25%), Midwest and Easterners (24%).

Readership of Special Newspaper Travel Sections on Alaska

Six out of every ten visitors to Alaska read special newspaper travel sections, making newspapers a key media for sales and information. These travel sections had a tremendous impact on package visitors of every type, with 65% of all Package visitors having read a special section. More than one-half (55%) of all Overseas visitors and 84% of visitors from Florida and Ontario, Canada reported being informed by special sections.

Frequent Flyer Program Use

Frequent flyer program mileage was used by someone in three out of ten Domestic Air user parties. Of all visitor parties, 26% had someone in their traveling party using a frequent flyer mileage ticket at some point in their Alaska trip. Most visitor groups made extensive use of frequent flyer programs. Business-related visitors and the Independent markets used them more than average while Package markets used them less. Just as in 1989, Domestic Air visitor parties from Florida (39%) were by far the heaviest users of the programs.

Clearly a significant proportion of the market wants to cut the cost of getting to and from Alaska. Access cost is a major barrier to Alaska visitor prospects. Frequent flyer programs most certainly expand the market to a destination where airline price competition is a fairly recent occurrence.

Travel Agent Involvement

Travel agents are very important to the marketing of Alaska package tours and somewhat important to assisting the Independent market with their travel arrangements. Travel agents provide a variety of services to Alaska visitors, but the two most common by far are providing brochures (39% of visitors get brochures from an agent) and actual booking of cruises or tours (38% book with an agent). Travel agents are also important for recommending transportation mode or type of trip (18% received recommendations). They also recommend a travel company, specific places of interest and lodging.

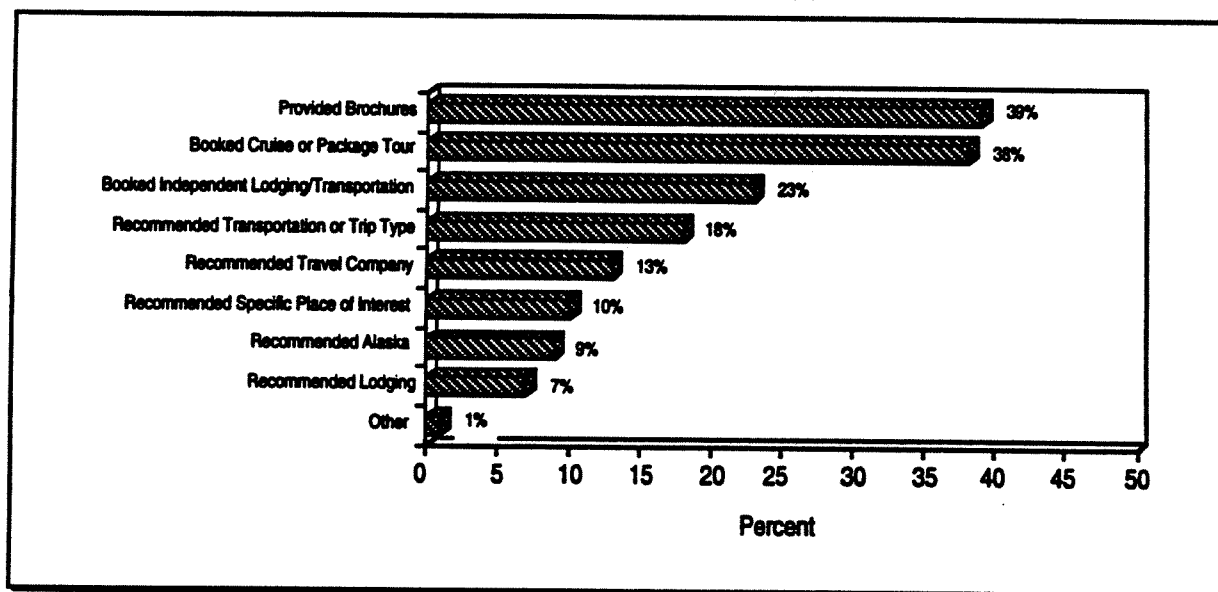
A significant share of the Independent market also used agents, for booking lodging and transportation. Almost all package visitors using agents booked cruises and tours with them. Only 6% of the package market but one-half of the Independent market did not use a travel agent at all.

Almost one-third (31%) of visitors did not use a travel agent at all.

Most visitors appear to have their mind already set on Alaska because only 9% of the market had an agent recommend an Alaska trip. However, this is slightly more common than four years ago.

Graph I-H

**Travel Agent Involvement
All Visitors - Summer 1993**



Visitor Demographics

Education

Alaska visitors were very well educated. More than one-quarter (27%) have attended or completed graduate school. One-fourth of them are college graduates. Another 44% have graduated from high school and had some college education.

Household Income

Alaska visitors are moderately well-to-do with average household incomes just over \$60,000. Almost three out of every ten visitors earns more than \$75,000.

Age & Gender

The average Alaska visitor is 50 years old. One-half of all visitors are over the age of 55 years. Slightly more males than females visited Alaska.

Employment

Over one-half of the state's visitors are employed at the time of their visit and more than one-third are retired. The balance of visitors are not in the labor force, such as children, students and others outside the labor force.

Origin

The West is the most important producer of Alaska visitors, followed by the South, Midwest, and East.

Table I-R

Demographics

All Visitors - Summer 1993

	Percent of Visitors
Visitor Education	
Not High School Graduates	4 %
High School Graduates	20
1 - 3 Years College	24
College Graduate	25
Attended or Completed Graduate School	27
Visitor Household Income (Average - \$60,500)	
Under \$25,000	9 %
\$25,000 - \$34,999	16
\$35,000 - \$49,999	20
\$50,000 - \$74,999	25
\$75,000 - \$99,999	17
\$100,000 and Over	12
Visitor Age (Average - 50 Years Old)	
Under 18 Years	5 %
18 - 24 Years	3
25 - 34 Years	10
35 - 44 Years	14
45 - 54 Years	19
55 - 64 Years	22
65 - 74 Years	22
75 + Years	6
Visitor Gender	
Male	53 %
Female	47 %
Visitor Employment	
Employed	52 %
Retired	38
Other	10
Visitor Origin	
West	37 %
California	14
Washington	9
Midwest	15
South	21
East	12
Canada	8
Overseas	7
Germany/Switzerland/Austria	2
Great Britain	1
Japan	1
Australia/New Zealand	2

Chapter II: Regional Visitor Profiles

Visitor Opinions

Visitor Travel Patterns

Visitor Trip Planning by Regional Visitors

Demographics



Visitor Opinions

Overall Alaska Trip Ratings

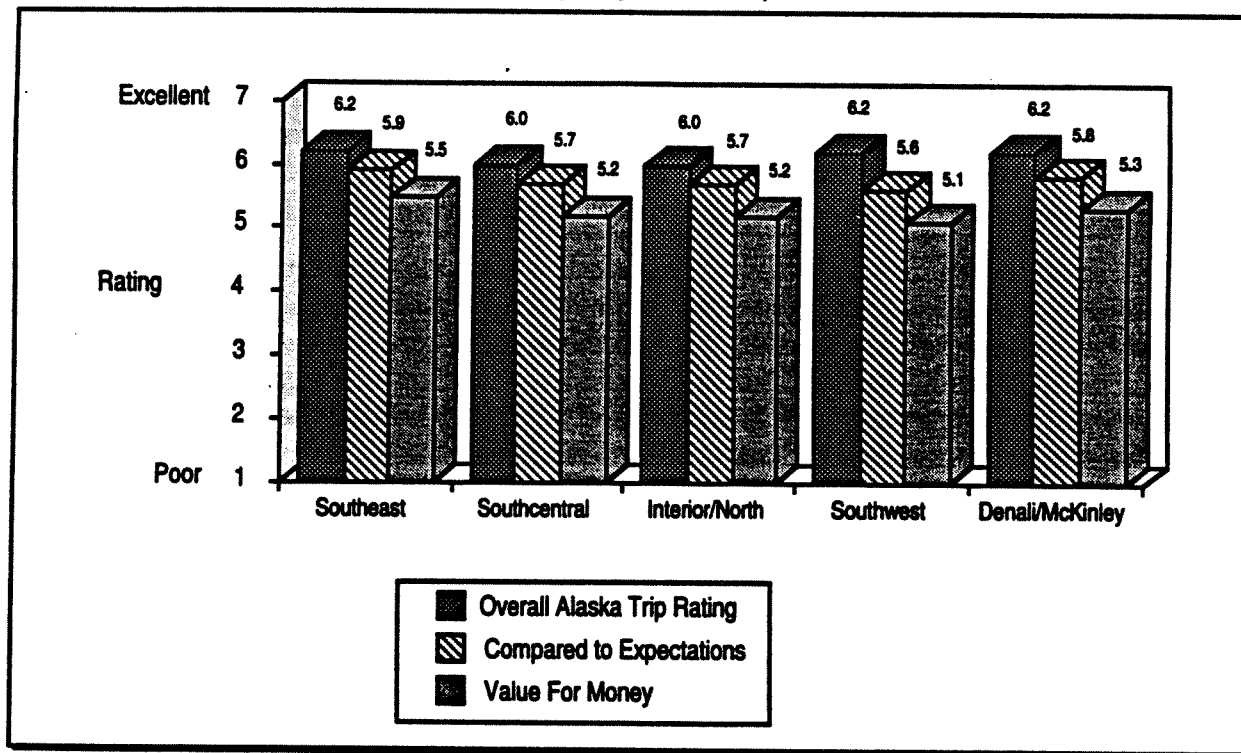
Visitors to every region rated their overall trip as a very positive experience. Southeast, Southwest, and Denali/McKinley received the highest average ratings of 6.2 on a scale of 1 (poor) to 7 (excellent) scale. Southcentral and the Interior/North followed closely with average ratings of 6.0. Compared with Summer 1989, the average rating for Southeast decreased significantly (from 6.3 to 6.2) as did Southcentral and the Interior (6.2 and 6.3, respectively in 1989). However, the overall ratings were still between "very good" and "excellent".

In all regions, visitors felt their trip exceeded their expectations. The highest rating belonged to Southeast (5.9) and the lowest to Southwest (5.6). However, Southwest was the only region to experience an increase in its compared to expectations rating since 1989 (from 5.3 to 5.6). The only significant decrease in expectations occurred in Southeast, which averaged 6.1 in 1989 and 5.9 in 1993. Nonetheless, Alaska seems to be meeting or exceeding the expectations of visitors.

While still better than average, the value for money ratings were lower than overall experience ratings. Since Summer 1989, all regions showed a slight decrease in their average ratings, though not significantly. Southeast had the highest rating of 5.5 and Southwest had the lowest value for the money rating of 5.1. For visitors to Southeast, the high volume of cruise ship passengers may have influenced its average rating, as cruise ship passengers appear to feel they receive a good value for their money. The majority of visitors to Southwest are a specialized group whose travel involves flying into more remote locations for fishing and hunting, which adds to the total cost of the trip.

Overall, visitors see Alaska as a positive, pleasing experience. Their perceptions of the trip were very positive and exceeded their expectations, despite the lower value for the money ratings.

Comparison of Alaska Trip Ratings All Visitors - Summer 1993 (By Region Visited)



Value for the Money Ratings

Visitors were asked to rate seven aspects of their overall trip in terms of value for the money. The people (friendliness/helpfulness) received the highest overall ratings (ranging from 6.0 to 6.3) for all regions, on a scale of 1 (poor) to 7 (excellent). Sightseeing/attractions were the next highest rated for all regions (from 5.8 to 6.0). Restaurants and accommodations were the lowest rated aspects across regions.

Southeast visitors gave the highest rating to friendliness/helpfulness. Moreover, they awarded the highest average ratings of any region for accommodations (although it was a significant decrease since 1989), transportation to Alaska and within Alaska, and for activities. The decreases in average value for the money ratings for accommodations and transportation from Alaska were significant from Summer 1989.

Southwest visitors gave the highest ratings for sightseeing/attractions and transportation from Alaska, yet the lowest ratings for restaurants and accommodations. There were significant declines in ratings for sightseeing, activities and restaurants, for Southcentral visitors. Average ratings for the Interior/North declined significantly from 1989, except for accommodations, activities and restaurants.

Visitors seemed less satisfied with some aspects of their trip experiences in terms of value for the money. Compared to 1989, people factors and sightseeing/attractions maintained their status as a high value for the money, despite a decrease in the overall ratings of sightseeing/attractions. The only factor which improved in the value for the money ratings since Summer 1989 was accommodations for Denali/McKinley.

Table II-A

**Value for Money Ratings
By Region Visited
All Visitors - Summer 1993
(1 = Poor and 7 = Excellent on 1 to 7 Scale)**

	South- east	South- central	Interior/ North	South- west	Denali/ McKinley
Accommodations	5.3	4.9	4.8	4.7	5.0
Transportation To Alaska	5.5	5.3	5.1	5.4	5.2
Transportation From Alaska	5.4	5.2	5.1	5.5	5.2
Transportation Within Alaska	5.5	5.2	5.1	5.3	5.3
Sightseeing/Attractions	5.8	5.8	5.8	6.0	5.9
Activities	5.5	5.4	5.3	5.4	5.4
Restaurants	5.1	4.8	4.7	4.6	4.9
Friendliness/Helpfulness	6.3	6.1	6.1	6.0	6.2

Regional Satisfaction Ratings

Visitors rated 44 features of their Alaska trip in each region they visited on a scale of 1 (poor) to 7 (excellent). Flightseeing, rafting, hiking, hunting and photography in all regions led the way in visitor satisfaction. Restaurants/night life, shopping and select accommodations were rated lower than other features, though still above average in most cases.

Cruise ships were the highest rated accommodation (6.0), followed by resorts/lodges, bed and breakfasts (5.9) and the Alaska Marine Highway (Ferry) (5.8). Visitors were less pleased with RV/campgrounds, which was supported by critical comments on the conditions of the grounds and the difficulties in obtaining necessary services. The lowest ratings went to hotels/motels, however this average rating of 5.2 was above average.

While air is the most utilized transportation mode, the highest ratings were for cruise ships and the trains in Alaska, both the White Pass Railroad and the Alaska Railroad. The Alaska Marine Highway and motorcoaches were next in the ratings. The cruise ship in the Southwest was a recent occurrence meeting with some success, given the highly positive rating. The train systems in Southeast and Southcentral significantly improved their ratings since 1989, as did the motorcoach mode in Southcentral.

Restaurant/night life scores remained similar in all regions since 1989, except in Southwest where it decreased. Shopping received the lowest average ratings of any feature, again above average in all regions except the Southwest.

The visitor information centers at Denali improved their ratings slightly since 1989. The visitor information centers in Southeast maintained their positive rating, however, Southcentral, Interior/North and Southwest visitor information centers all declined somewhat in their satisfaction rating since 1989, though this decline is not statistically significant. Still, visitor information centers in all regions rated well above average, except in the Southwest.

Sightseeing ratings ranged from 6.9 to 5.6, all well above average. Flightseeing was the most popular experience for visitors. The riverboat cruises of the Interior/North were very satisfying to visitors, as were day cruises in the other regions. The park/bus tour in Denali/McKinley received a slightly lower but still very positive rating of 5.7.

Cultural attractions/museums received generally positive ratings, with Southwest and Denali/McKinley improving their scores from 1989. Visitors sent many positive comments about the museums in Anchorage.

The Southwest region garnered many high marks for its activities, achieving excellent ratings for rafting and hunting and the next high marks in saltwater fishing and wildlife viewing. Hunting received the highest overall satisfaction ratings, followed by rafting, photography, hiking and saltwater fishing.

Table II-B

Regional Satisfaction Ratings
Accommodations, Services and Activities
All Visitors - Summer 1993
(1 = Poor and 7 = Excellent on 1 to 7 Scale)

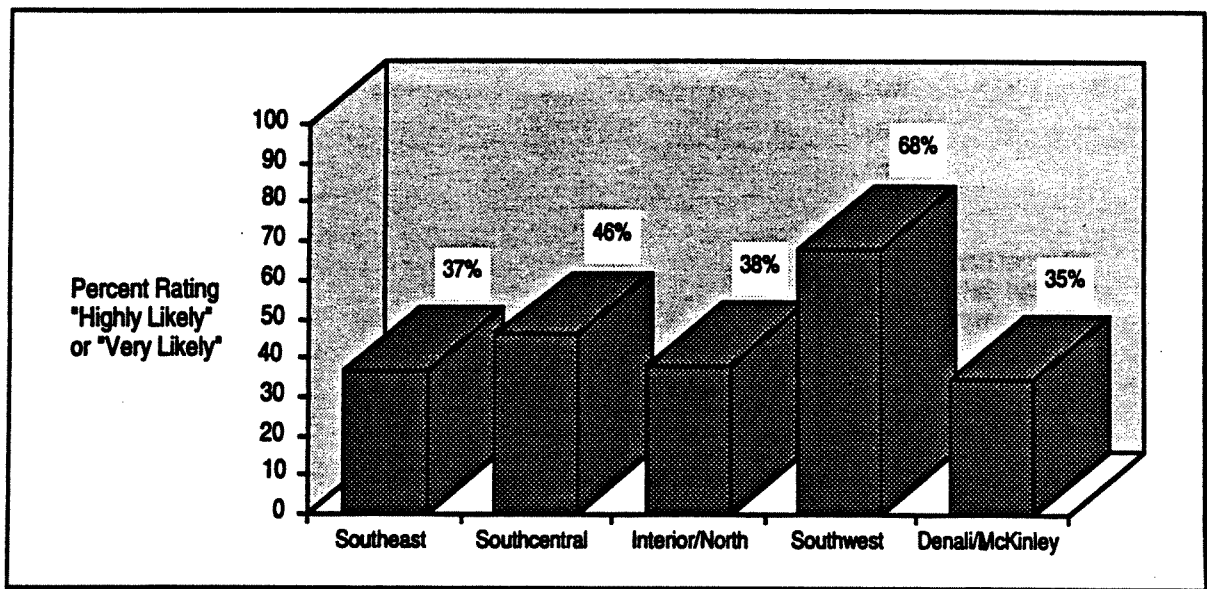
	South-east	South-central	Interior/North	South-west	Denali/McKinley
Accommodations					
Hotel/Motel	5.1	5.2	5.2	4.1	5.2
Resort/Lodge	6.2	5.2	6.1	6.2	5.8
Bed & Breakfast	6.0	5.7	5.9	5.9	6.0
RV/Campground	5.2	5.2	5.3	5.2	5.2
Cruise Ship	6.2	5.9	-	-	-
Ferry	5.6	5.8	-	6.0	-
Other	5.3	5.3	5.5	3.0	5.9
Transportation					
Motorcoach	5.7	5.7	6.0	6.7	5.2
Train	6.3	6.2	6.3	-	6.3
Air	5.7	5.6	5.8	5.6	5.9
Cruise Ship	6.3	6.3	-	6.0	-
Ferry	5.8	5.4	-	6.4	-
Rental Car	5.7	5.4	5.5	5.9	5.9
Rental RV	5.2	5.6	5.4	-	5.5
Restaurants/Night life	5.2	5.1	4.9	3.8	4.8
Shopping	5.2	5.0	5.0	3.4	4.7
Visitor Information Centers	5.9	5.8	5.9	4.6	5.9
Sightseeing					
Flightseeing	6.5	6.3	6.5	6.9	6.6
Day Cruises	6.1	6.1	-	6.5	-
Riverboat Cruises	-	-	6.6	-	-
City Tours	5.7	5.7	5.7	6.1	-
Native Cultural Presentations	5.9	5.8	6.2	5.0	-
Shows/Alaska Entertainment	5.5	5.7	5.9	6.0	-
Park/Bus Tour	-	-	-	-	5.7
Other Tours	6.0	6.0	6.1	5.6	6.1
Cultural Attractions/Museums	5.7	5.8	5.9	5.7	5.8
Activities					
Canoeing/Kayaking	6.4	6.2	6.0	5.7	4.9
Rafting	5.9	6.2	6.0	7.0	6.3
Hiking	5.9	6.0	5.8	6.3	6.2
Fishing (Overall)	5.8	5.7	5.6	6.4	5.1
Freshwater Fishing	5.5	5.4	5.4	6.5	4.8
Saltwater Fishing	5.9	5.9	5.6	6.7	-
Wildlife Viewing	5.8	5.9	5.5	6.6	5.7
Bird Watching	5.8	5.7	5.6	6.3	5.3
Hunting	5.7	6.6	6.5	7.0	6.9
Dogsledding	5.6	4.0	5.5	-	4.6
Camping	5.5	5.5	5.4	5.3	5.3
Casual Walking	5.7	5.8	5.5	6.1	5.8
Photography	6.3	6.2	5.9	6.4	6.1
Northern Lights Viewing	4.8	5.4	4.7	-	4.6
Other	6.7	5.6	5.6	6.5	6.7

Likelihood of Visiting Alaska Again for Vacation

Visitors were asked about the likelihood of their visiting Alaska again, on a 1 (very unlikely) to 7 (very likely) scale on a vacation. More than two-thirds of visitors to Southwest stated the high probability of returning to Alaska for another vacation. Almost one-half of visitors to Southcentral felt they would most likely return. More than one-third of visitors to Southeast, the Interior and Denali expressed a strong desire to return again for a vacation.

Graph II-B

High Likelihood of Visiting Alaska Again for Vacation All Visitors - Summer 1993 (By Region Visited)

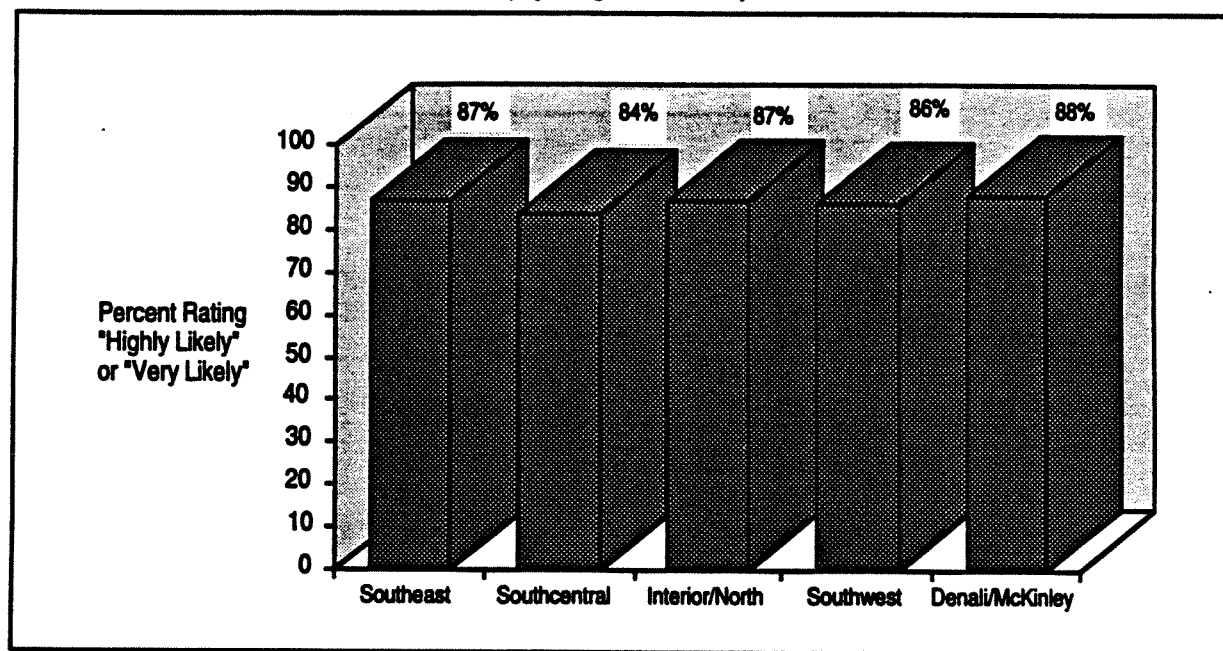


Likelihood of Recommending Alaska as a Vacation Place

Visitors to all regions have a high likelihood of recommending Alaska as a place to vacation. Many visitors commented that they had already recommended Alaska to friends and family upon their return from their trips. This speaks positively of the value of word-of-mouth advertising for the state. However, there have been slight declines in the percentage of visitors recommending Alaska since Summer 1989.

Graph II-C

High Likelihood of Recommending Alaska All Visitors - Summer 1993 (By Region Visited)



Misconceptions About Alaska

Visitors to all regions had misconceptions about the weather which were cleared up by their Alaska trip. Almost one-half of all visitors to Southeast (48%) found that the weather was better than expected. For all visitors to Alaska, the exceptionally mild weather of Summer 1993 proved a pleasant surprise.

Ten percent (10%) of visitors to Southwest were pleased to find the natural attractions of the state more appealing than they expected. Visitors to Denali found the state was bigger than they thought. One-third of visitors to Southwest reported that the state was different than they expected.

More visitors found Alaska to be worse than expected than during Summer 1989. Primarily the attractions and appeal of Alaska did not live up to the expectations of these visitors, especially those visiting the Interior, Denali and Southcentral. These visitors reported seeing less wildlife than expected and found the state to be more developed than they expected.

Table II-C

Biggest Misconception Cleared Up By Visit to Alaska
All Visitors - Summer 1993
 (Percent of Each Region's Visitors)

	South- east	South- central	Interior/ North	South- west	Denali/ McKinley
Better Than Expected	66%	66%	60%	53%	63%
Weather	48	44	38	41	40
Attractions/Appeal of Alaska	7	7	5	10	5
State Bigger Than Thought	5	6	7	-	8
Roads	3	5	6	-	7
Accommodations/ Transportation Facilities	3	2	3	2	2
Prices/Cost	1	2	1	-	<1
Friendlier	<1	1	<1	1	1
Other	1	2	2	2	2
Different Than Expected	20%	15%	17%	34%	17%
Worse Than Expected	12%	15%	18%	11%	16%
Attractions/Appeal of Alaska	10	12	16	9	14
Prices/Cost	1	1	<1	1	1
Accommodations/ Transportation Facilities	<1	<1	<1	-	<1
Roads	1	1	2	-	1
Weather	<1	<1	<1	-	<1
Other	1	2	3	-	2

What Did You Plan To Do In Alaska That You Did NOT Do?

Visitors were asked what they planned to do in Alaska that they did not get an opportunity to do. Across all regions, visitors planned to include additional areas on their itineraries but were unable to do so. This was especially true for visitors to Southcentral and Southwest. Visitors may be underestimating transportation factors when attempting to reach more remote locations in these regions.

Being unable to go fishing or engage in other recreational activities were disappointments for visitors to all regions, particularly Southwest. Visitors to Denali were unable to include certain attractions and day trips into their itineraries, as were visitors to the Interior.

Visitors to Southeast most wanted to see additional towns and areas. Other activities they wanted to include were fishing, additional attractions and day trips, seeing wildlife and flightseeing.

Table II-D

What Did You Plan To Do In Alaska That You Did NOT Do? All Visitors - Summer 1993 (By Region Visited)

	South- east	South- central	Interior/ North	South- west	Denali/ McKinley
1. Include Additional Towns/Areas	23 %	32 %	25 %	31 %	29%
2. Fish	16	17	14	22	13
3. See Additional Attractions/Day Trip	15	15	17	11	16
4. Do Recreational Activities	9	9	14	17	11
5. See Wildlife	13	9	10	9	12
6. Flightsee	10	6	5	-	7
7. Take Train	3	2	2	-	2
8. Change Length of Stay/ Budget Time Differently	1	1	2	-	2
9. Make Specific Purchases/ Shop In General	1	<1	<1	-	<
10. Take Ferry	<1	1	1	-	1
11. Enjoy Night life/Entertainment	<1	<1	<1	-	<1
12. Other	7	5	9	-	7

What Did You Do In Alaska That You Had NOT Planned To Do?

Visitors were asked what they did during their trip that they had not planned to do. Most visitors, across regions, visited additional attractions or took day trips. More than one-third (37%) of all visitors to Southwest were able to take additional day trips or see more attractions. One-third of visitors to Southwest took part in unscheduled recreational activities. Thirteen percent (13%) of visitors to Southwest added fishing to their itineraries.

Southeast visitors took the opportunity to add recreational activities, such as rafting, to their plans and flightseeing, a popular Southeast sightseeing attraction. Visitors to Denali also added recreational activities and flightseeing to their plans.

Table II-E

What Did You Do In Alaska That You Had NOT Planned To Do? All Visitors - Summer 1993 (By Region Visited)

	South- east	South- central	Interior/ North	South- west	Denali/ McKinley
1. Saw Additional Attractions/Day Trips	31 %	26 %	25 %	37 %	24 %
2. Added Recreational Activities	17	19	15	35	21
3. Went Flightseeing	17	15	15	1	19
4. Visited Additional Towns/Areas	7	9	12	3	11
5. Went Fishing	3	6	3	13	4
6. Made Specific Purchases/ Shop In General	7	3	4	-	4
7. Enjoyed Night-life/Entertainment	2	4	2	2	2
8. Saw Wildlife	2	1	2	-	<1
9. Changed Length of Stay/ Budgeted Time Differently	1	1	3	1	2
10. Rode the Train	1	1	<1	-	<1
11. Went on the Ferry	1	1	1	-	1
12. Went Wilderness Camping	-	<1	<1	-	<1
13. Other	11	12	18	11	12

Visitor Travel Patterns

Entry and Exit Modes by Region Visited

Domestic Air was the most common mode for entering and exiting Alaska for all regions except Southeast where Cruise Ship was the most often used mode. Southwest depended heavily on visitors entering the state by Domestic Air, as did Southcentral. In addition to Domestic Air, the Highway was an important entry and exit mode for visitors to the Interior/North and Denali/McKinley. Mode mixing, where visitors entered by one mode and exited by another for example, was evident between the Highway and the Alaska Marine Highway (Ferry), particularly in Southeast, Interior/North and Denali/McKinley. Many Highway entries used the Ferry to exit the state and vice versa.

Table II-F

**Entry Mode Into Alaska
By Region Visited
All Visitors - Summer 1993
(Percent of Each Region's Visitors)**

	South- east	South- central	Interior/ North	South- west	Denali/ McKinley
Domestic Air	31%	62%	48%	86%	52%
Cruise Ship	49	18	18	2	19
Highway ¹	14	14	26	4	21
Ferry	6	3	6	2	6
International Air	<1	2	1	5	2

¹ Highway mode includes personal vehicles only. Not included are motorcoaches and trucks.

Table II-G

**Exit Mode From Alaska
By Region Visited
All Visitors - Summer 1993
(Percent of Each Region's Visitors)**

	South- east	South- central	Interior/ North	South- west	Denali/ McKinley
Domestic Air	33%	66%	51%	86%	53%
Cruise Ship	46	15	14	3	16
Highway ¹	14	14	27	5	21
Ferry	6	3	6	1	6
International Air	1	3	2	6	3

¹ Highway mode includes personal vehicles only. Not included are motorcoaches and trucks.

Total Mode Market By Region Visited

A more in-depth assessment of the importance of each mode is the following analysis of mode market size by region. The mode market size is defined as the total number of visitors using a particular mode for either entry, exit or both. For example, in the Southeast region 249,200 visitors used Domestic Air. The figure represents a total of those entering by Domestic Air, those exiting by Domestic Air and those using Domestic Air to both enter and exit the state.

Domestic Air was the dominant transportation mode for all regions, except Southeast, where more visitors utilized the Cruise Ship mode. However, it is apparent that all transportation modes are important to all regions. Clearly, many visitors experience the use of different modes of transportation.

This information can be used by marketers in different regions to reach visitors using the various modes. For instance, 33,300 Ferry users went through Denali/McKinley during their trip. Businesses around Denali/McKinley can reach this primarily independent market through distribution channels important to Ferry users (i.e., the *State of Alaska Official Vacation Planner*). Marketers can study these mode use patterns to fully understand how visitors to their region are accessing the state.

Table II-H

Mode Use By Region Visited All Visitors - Summer 1993 (Number of Each Region's Visitors)

	South- east	South- central	Interior/ North	South- west	Denali/ McKinley
Domestic Air	249,200	450,200	200,300	42,000	219,300
Cruise Ship	320,000	170,500	94,200	2,200	106,300
Highway ¹	84,400	91,200	92,000	2,400	75,500
Ferry	50,900	35,700	33,300	1,000	33,300
International Air	5,800	17,600	6,700	2,800	11,200

¹ Highway mode includes personal vehicles only. Not included are motorcoaches and trucks.

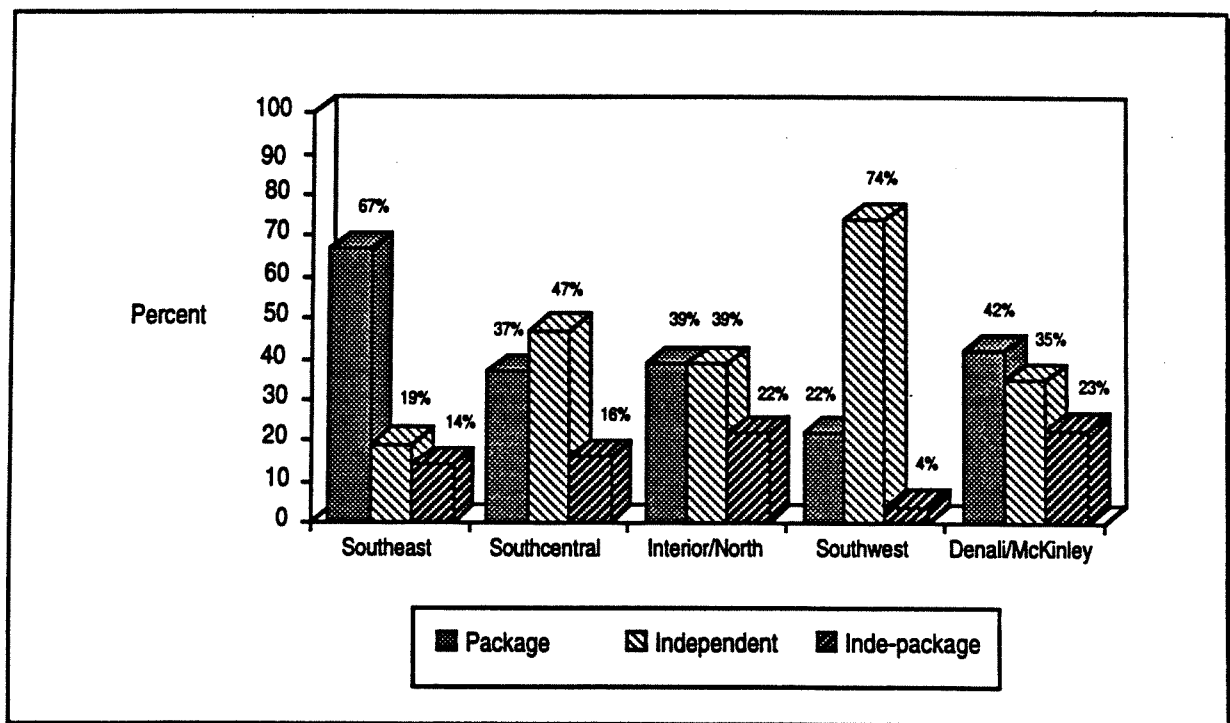
Visitor Travel Type by Region Visited

The type of travel visitors used to visit the state can be defined as follows: Package, Independent (not traveling on a prearranged package trip), and Inde-Package (Independents who purchase sightseeing tours while inside the state).

Each region has its own unique mix of visitor travel types. Southeast attracted the package tour market, with two-thirds of its visitors having purchased prearranged packages. One-third of its market belonged to Independent visitors, some of whom purchased sightseeing tours while instate. Southwest was predominantly an Independent market with only one-quarter of its visitors purchasing any type of prearranged package. The Interior/North and Denali/McKinley attracted the largest number of Inde-Package visitors, primarily a result of the cruise/tour packages arranged in these regions.

Graph II-D

Travel Type of Regional Visitors
All Visitors - Summer 1993



Length of Stay by Region Visited

Length of stay in Alaska and in each region visited varied among the regional groups. Visitors to the Southwest stayed the longest, more than two weeks in the state with almost a full week in the region, on average. In 1989, visitors to the Interior/North stayed the longest in the state but the shortest in the region.

The length of stay for visitors to the Southeast region reflected the current patterns of package tours. The approximately five day average stay in the region marked the length of most cruise portions of package tours. The nine day stay in the state indicates the growing popularity of cruise/tour packages. Many Southeast visitors were able to take advantage of packages which included visiting other regions. There were also changes in travel patterns among Independent visitors.

More than one-half (58%) of the average length of stay for Southcentral visitors was spent in the region, a stay of about six days. These visitors spent another six days in the state. Southcentral, having Anchorage as a transportation hub and attracting more than one-half of all visitors to the state, has maintained its appeal to visitors, despite a slight decrease in the lengths of stay since 1989.

Shorter lengths of stay has been and continues to be a national trend. People are taking shorter and more frequent vacations. This trend was most strongly apparent in the Southeast and Southcentral regions.

Visitors to the Interior/North stayed a comparatively shorter length of time in the region, just about four days on average, yet remained in the state an additional nine days. The number of visitors entering the Interior/North by personal vehicle may be responsible for these numbers as well as the frequent travel of our Canadian neighbors.

Denali/McKinley visitors stayed the shortest length of time in the region, two days on average, but spent another eleven days in the state.

Table II-I

**Length of Stay
By Region Visited
All Visitors - Summer 1993
(Average Number of Nights)**

	South- east	South- central	Interior/ North	South- west	Denali/ McKinley
Length of Stay in Alaska	9.1	11.7	13.0	14.2	13.4
Length of Stay in Region	4.8	6.2	3.7	6.6	1.7
Percent of Alaska Trip Time in Region	53 %	53 %	28 %	46 %	13 %

Length of Stay by Community

Table II-J shows the average number of nights spent by visitors in the regions and the communities within the regions. The typical visitor to Southeast spent an average 4.8 nights in the region. The majority of that time, 2.8 nights, was spent at sea, either on a cruise ship or ferry. The other major stops were Juneau, Ketchikan and Skagway. The amount of time spent in wilderness locations and other Southeast communities more than likely reflected the length of stay patterns of Independent visitors.

Visitors to Southcentral spent almost more than one-half of their nights in Anchorage – 3.3 of 6.2 nights. Other communities attracted visitors to the region, such as Valdez which increased slightly from 1989. Other communities experienced a slight decline in length of stay over the last four years. However, again there was a number of visitors who stayed in wilderness locations.

The Interior/North had a slight increase in the average number of nights spent since 1989. Fairbanks and Tok were the communities which experienced the longest average stays in the region.

Southwest visitors spent much of their time in wilderness locations, indicative of the appeal of the region. Most visitors to Southwest go to fishing camps, lodges or remote areas and are attracted to the various types of adventure activities of the area.

Denali/McKinley maintained its average length of stay compared to four years ago.

Table II-J

Length of Stay by Community
All Visitors - Summer 1993
(Average Number of Nights Spent by Regional Visitors in Region and Community)

	Average # of Nights
Southeast	4.8
At Sea	2.8
Ketchikan	0.3
Wrangell	-
Petersburg	0.1
Sitka	0.1
Juneau	0.4
Haines	0.2
Skagway	0.3
Glacier Bay	0.1
Wilderness Locations	0.3
Other Southeast Communities	0.3
Southcentral	6.2
At Sea	0.3
Anchorage	3.3
Homer	0.3
Kenai	0.2
Seward	0.3
Other Kenai Peninsula Communities	0.1
Wasilla	0.2
Palmer	0.1
Glennallen	0.1
Soldotna	0.5
Valdez	0.3
Prince William Sound	-
Cordova	-
Whittier	-
Wilderness Locations	0.3
Other Southcentral Communities	0.2
Interior/North	3.7
Fairbanks	2.2
Tok	0.4
Kotzebue	0.1
Nome	0.2
Prudhoe Bay	0.3
Barrow	-
Wilderness Locations	0.2
Other Interior/North Communities	0.3
Southwest	6.6
At Sea	-
Bethel	-
Dillingham	-
Kodiak	0.8
Katmai	0.3
Iliamna	0.6
King Salmon	0.4
Pribilofs	0.1
Aleutian Islands	1.4
Wilderness Locations	2.3
Other Southwest Communities	0.6
Denali/McKinley	1.7

Lodging Type by Region Visited

Lodging Type Use

Table II-K describes lodging use of visitors in each region. The majority of visitors to Southeast used a cruise ship as their lodging type, followed by hotels/motels and the Alaska Marine Highway (Ferry). RV/campgrounds were the fourth most utilized lodging in the region.

Almost three out of five visitors used hotels/motels in the Southcentral (57%) and Interior/North (58%) regions. One in four visitors to Southcentral used a cruise ship while the same percentage used an RV/campground in the Interior/North. Private homes were the third most popular type of lodging in both regions.

More than one-third of visitors to the Southwest used hotels/motels and another 23% used resorts/lodges. The third most popular form of lodging was in the wilderness, such as a camping site or cabin. A number of visitors stayed in private homes (15%).

Two-thirds of the visitors to Denali/McKinley stayed in either hotels/motels or resorts/lodges. The bulk of the other third spent their nights in RV/Campgrounds.

Bed and breakfast accommodations increased in popularity since 1989 in the Southeast, Southcentral and Interior/North. The use of private homes decreased in every region except the Interior/North over the last four years.

Table II-K

Lodging Type Use By Region Visited All Visitors - Summer 1993 (Percent of Each Region's Visitors)

Lodging Type	South-east	South-central	Interior/North	South-west	Denali/McKinley
Hotel/Motel	22 %	57 %	58 %	37 %	23 %
Resort/Lodge	5	5	2	23	44
Bed & Breakfast	2	9	5	5	1
Private Home	4	22	10	15	<1
RV/Campground	11	17	26	7	30
Cruise Ship	66	26	-	-	-
Ferry	13	<1	-	3	-
Wilderness Other	3	6	4	19	4
Other	1	3	5	21	1

Length of Stay by Lodging Type

The following table, II-L, shows the average number of nights by users of each type of lodging, by region. Visitors who stayed in private homes in the Southeast, Southcentral and Interior regions spent the longest average number of nights. Visitors to the Southwest and Denali/McKinley regions who used wilderness settings, such as cabins, and other lodgings, such as private boats, spent the longest average number of nights compared to users of other types of lodging.

For hotel/motels the average length of stay was similar in all regions except Denali/McKinley, which tended to be shorter by one night. Resort/lodge use varied considerably by region, with Southwest visitors staying longer in this type of lodging. Average bed and breakfast use was similar to hotel/motel use in each region except the Interior/North where it was the longest and Southwest where it was the shortest. Visitors who used private homes for lodging tended to stay for comparatively longer periods than those in other types of lodging, across regions. RV/campground users in Southcentral had a longer average stay than users in any other region.

Cruise ship users spent an average of four nights in Southeast and one or two nights in Southcentral. Users of the Alaska Marine Highway (Ferry) in Southeast spent two nights on board, less time overnight than cruise ship users. The small percentage of ferry users in Southcentral spent one to two nights on board.

Table II-L

**Length of Stay by Lodging Type
By Region Visited
All Visitors - Summer 1993
(Average Number of Nights by Users of Each Type Only)**

Lodging Type	South-east	South-central	Interior/ North	South-west	Denali/ McKinley
Hotel/Motel	2.4	2.9	2.3	3.6	1.6
Resort/Lodge	3.4	2.5	2.2	5.5	1.4
Bed & Breakfast	3.4	2.7	4.0	1.0	2.0
Private Home	12.3	10.5	9.2	6.5	2.8
RV/Campground	4.4	8.2	3.8	2.2	2.6
Cruise Ship	4.0	1.4	-	-	-
Ferry	2.0	1.5	-	1.5	-
Wilderness Other	9.6	4.4	4.0	10.9	6.8
Other	3.3	8.3	7.5	11.8	5.3

Lodging Type Use by Community

Table II-M provides detailed community information on the percentage of visitors who used a particular lodging type in a specific community; Table II-N presents the length of stay in each community of those who used that particular lodging type. These tables read across, rather than from top to bottom. These tables are excellent reference documents for understanding the specific lodging use in a particular community.

In Southeast, most communities have hotels/motels and RV/Campgrounds which were utilized by a number of visitors who spent time in the region. Bed and breakfast accommodations are becoming quite popular in the Southeast region and are being used more and more each year.

Southcentral provided a wide variety of lodging types in and among its communities. Another important factor in Southcentral was the percentage of visitors using wilderness locations.

The Interior/North expanded its lodging types since 1989 with more bed and breakfast accommodations available. There was still substantial use of RV/Campgrounds and a strong use of wilderness locations.

The lodging types used in Southwest were indicative of the types of activities of the visitors in the different communities.

Visitors to Denali/McKinley primarily used resort/lodges, RV/Campgrounds and hotels/motels.

Table II-M

Lodging Type Use
All Visitors - Summer 1993
 (Percent of Regional Visitors Using Lodging by Each Community)

	Hotel/ Motel	Resort/ Lodge	Bed & Breakfast	Private Home	RV/ Campground	Cruise Ship	Ferry	Wilderness Other
Southeast								
At Sea	<1 %	- %	- %	<1 %	- %	83 %	16 %	- %
Ketchikan	60	10	5	12	17	-	-	2
Wrangell	55	-	9	5	32	-	-	-
Petersburg	44	-	14	10	31	-	-	-
Sitka	43	7	19	11	18	-	-	1
Juneau	70	<1	5	14	11	-	-	-
Haines	24	1	1	<1	69	-	-	3
Skagway	52	1	3	-	45	-	-	-
Glacier Bay	11	66	5	-	8	-	-	27
Wilderness Locations	-	29	-	-	1	-	-	69
Other Southeast Locations	15	31	10	16	26	-	-	-
Southcentral								
At Sea	-	-	-	-	-	99	1	-
Anchorage	65	1	5	21	12	-	-	<1
Kenai	36	15	3	6	40	-	-	4
Seward	24	-	13	5	51	-	-	8
Other Kenai Peninsula Communities	3	-	-	31	65	-	-	-
Homer	22	<1	17	8	51	-	-	4
Wasilla	11	-	6	33	46	-	-	-
Palmer	25	-	2	12	61	-	-	1
Glennallen	19	1	1	1	74	-	-	3
Soldotna	23	8	12	19	37	-	-	6
Valdez	21	4	12	4	57	-	-	4
Prince William Sound	-	-	-	-	100	-	-	-
Cordova	91	6	-	3	-	-	-	-
Whittier	36	-	-	-	64	-	-	-
Wilderness Locations	-	13	-	7	34	-	-	46
Other Southcentral Locations	14	8	1	32	41	-	-	12
Interior/North								
Fairbanks	60	1	6	8	24	-	-	2
Tok	40	<1	<1	-	59	-	-	1
Kotzebue	88	-	-	13	-	-	-	-
Nome	53	-	3	16	11	-	-	10
Barrow	88	-	-	-	8	-	-	-
Prudhoe Bay	40	-	-	-	4	-	-	2
Wilderness Locations	-	6	-	6	40	-	-	49
Other Interior Locations	23	3	<1	23	35	-	-	12
Southwest								
At Sea	-	-	-	-	-	-	100	-
Bethel	-	-	-	-	100	-	-	-
Dillingham	-	7	-	93	-	-	-	-
Kodiak	61	-	2	23	12	-	-	-
Katmai	-	95	-	-	5	-	-	-
Iliamna	-	47	30	-	23	-	-	30
King Salmon	63	20	-	1	-	-	-	-
Pribilofs	100	-	-	-	-	-	-	-
Aleutian Islands	18	-	-	31	-	-	-	14
Wilderness Locations	-	20	-	-	3	-	-	59
Other Southwest Locations	69	31	-	-	-	-	-	-
Denali/McKinley	23 %	44 %	1 %	<1 %	30 %	- %	- %	4 %

Table II-N

Lodging Type Use
All Visitors - Summer 1993
(Average Number of Nights Spent by Regional Visitors in Region and Community)

	Hotel/ Motel	Resort/ Lodge	Bed & Breakfast	Private Home	RV/ Campground	Cruise Ship	Ferry	Wilderness Other
Southeast								
At Sea	2.3	-	-	2.0	-	3.2	2.0	-
Ketchikan	2.2	2.9	2.1	9.9	5.0	-	-	4.5
Wrangell	1.9	-	1.0	2.0	2.5	-	-	-
Petersburg	3.6	-	1.2	7.9	2.1	-	-	-
Sitka	1.7	4.0	2.0	7.8	4.7	-	-	2.5
Juneau	1.9	2.0	2.8	7.0	3.3	-	-	-
Haines	1.1	1.0	12.5	7.9	2.6	-	-	1.3
Skagway	1.2	1.1	1.3	-	1.9	-	-	2.0
Glacier Bay	-	-	-	-	-	-	-	-
Wilderness Locations	-	4.0	-	-	3.6	-	-	14.1
Other Southeast Locations	-	-	-	-	-	-	-	-
Southcentral								
At Sea	2.3	-	-	2.0	-	3.2	2.0	-
Anchorage	2.4	2.0	2.5	10.1	2.7	-	-	2.7
Kenai	-	-	-	-	-	-	-	-
Seward	1.4	-	1.5	3.2	2.0	-	-	1.9
Other Kenai Peninsula Communities	2.4	-	-	3.4	4.7	-	-	-
Homer	1.5	1.0	1.3	4.3	2.2	-	-	1.4
Wasilla	1.8	-	1.0	7.8	2.1	-	-	-
Palmer	3.0	-	4.9	3.1	1.6	-	-	1.0
Glennallen	-	-	-	-	-	-	-	-
Soldotna	-	-	-	-	-	-	-	-
Valdez	1.4	2.1	1.4	5.6	2.0	-	-	1.9
Prince William Sound	-	-	-	-	-	-	-	-
Cordova	1.5	1.0	-	6.0	-	-	-	-
Whittier	1.0	-	-	-	1.0	-	-	-
Wilderness Locations	-	2.9	-	2.6	2.5	-	-	4.8
Other Southcentral Locations	-	-	-	-	-	-	-	-
Interior/North								
Fairbanks	2.0	2.6	4.1	8.8	2.8	-	-	1.1
Tok	1.2	1.7	1.5	-	1.7	-	-	1.3
Kotzebue	1.0	-	-	6.0	-	-	-	-
Nome	1.6	-	1.0	8.5	1.7	-	-	6.6
Barrow	1.0	-	-	-	1.0	-	-	-
Prudhoe Bay	-	-	-	-	-	-	-	-
Wilderness Locations	-	2.0	-	13.4	3.0	-	-	5.8
Other Interior Locations	-	-	-	-	-	-	-	-
Southwest								
At Sea	2.3	-	-	2.0	-	3.2	2.0	-
Bethel	-	-	-	-	6.0	-	-	-
Dillingham	-	13.0	-	1.0	-	-	-	-
Kodiak	3.9	13.0	1.0	12.3	3.9	-	-	-
Katmai	-	6.2	-	-	6.0	-	-	4.0
Iliamna	-	7.0	1.0	-	1.0	-	-	5.0
King Salmon	2.0	1.1	-	10.0	-	-	-	-
Pribilofs	2.9	-	-	-	-	-	-	-
Aleutian Islands	1.0	-	-	5.9	-	-	-	21.0
Wilderness Locations	-	4.5	-	-	1.0	-	-	9.9
Other Southwest Locations	7.7	6.0	-	-	3.0	-	-	-
Denali/McKinley	1.6	1.4	2.0	2.8	2.1	-	-	6.1

Regional Visitor Overlap Patterns

Most visitors to Alaska visited more than one region during their trip. Table II-O illustrates these regional visit overlap patterns. More than one-half (55%) of visitors to Southeast also visited Southcentral. More than one-third visited the Interior/North (27%) and Denali/McKinley (38%), but only 2% visited Southwest. These figures reflect the tour patterns of the cruise market.

Southcentral visitors traveled widely throughout other regions. More than half of all visitors traveled to Denali/McKinley. Less than one-half of these visitors went into Southeast and the Interior.

Among visitors to the Interior nearly nine of ten traveled to Southcentral and more than three-quarters visited Denali. Southeast attracted 63% of Interior visitors and Southwest drew the fewest amount.

Southwest visitors tended to stay in the region, though 86% visited Southcentral. Nearly all Denali/McKinley visitors used Southcentral for its transportation connections. Three-quarters of Denali visitors went to the Interior and nearly two-thirds traveled through Southeast.

Table II-O

**Regional Visitor Overlap
By Region Visited
All Visitors - Summer 1993
(Percent of Each Region's Visitors)**

Also Visited	Regions Visited				
	South-east	South-central	Interior/North	South-west	Denali/McKinley
Southeast	100 %	48 %	63 %	21 %	64 %
Southcentral	55	100	89	86	99
Interior/North	37	46	100	26	76
Southwest	2	7	4	100	4
Denali/McKinley	38	52	77	24	100

Community Visitor Overlap

Table II-P identifies the percentage of visitors to each region who visited communities in other regions of the state, a valuable tool for instate marketing.

More than one-half (51%) of the visitors to Southeast visited Anchorage on their trip, while 35% visited Fairbanks and another 38% visited Denali. For many of these visitors, this followed the cruise/tour itineraries. However, there were indications of extended travel by independent visitors as well. In 1993, 29% of visitors to Southeast included Seward in their travels, an increase from 1989. Tok maintained its attraction for Southeast visitors at 21%.

Nearly two in every five visitors to Southcentral stopped in Juneau and Skagway, again an indication of the cruise/tour schedules. Sitka experienced an increase in Southcentral visitors since 1989. Two in five Southcentral visitors also visited Fairbanks and 24% visited Tok. More than one-half of Southcentral visitors (52%) visited Denali/McKinley.

Approximately one-half of visitors to the Interior/North visited Juneau (46%) and Skagway (52%), while another 41% visited Ketchikan, an increase since 1989. While the majority of visitors to the Interior/North visited Anchorage, since air transportation schedules usually include a stop, there have been increases in the visitors who visited other Southcentral communities. Four out of ten Interior/North visitors stopped in Seward; in 1993, an increase since 1989. Only Whittier experienced a noticeable decrease in Interior/North visitations. This seems to indicate that visitors are using instate overnight/day tours and also expanding on their own independent itineraries.

Air traffic to Southwest included transportation through Anchorage, therefore it was not unusual to have Southwest visitors spending time there. Since 1989 there has been an increase in the visitors who spent time in Southeast communities and the other communities outside of Anchorage in Southcentral, as well as in Southwest and visitors going to Denali. This is a change from 1989, when Southwest visitors came to fish in that region and spent very little time in any other communities and regions. However, visitors to Southwest seemed to be most interested in the adventure activities of the region.

Visitors to the Denali/McKinley region tended to travel around the state, though seldom visiting the Southwest region. Popular spots for visitors to Denali/McKinley included Juneau (50%), Skagway (52%), Anchorage (97%), Seward (53%), and Fairbanks (73%). Denali/McKinley visitors increased their visits to Southeast communities and some Southcentral communities since 1989.

Table II-P

Community Visitor Overlap
All Visitors - Summer 1993
 (Percent of Each Region's Visitors)

Visitors to These Regions:	South- east (502,800)	South- central (569,300)	Interior/ North (295,100)	South- west (47,100)	Denali/ McKinley (301,200)
Visited These Communities:					
Southeast					
Juneau	81 %	39 %	46 %	13 %	50 %
Ketchikan	77	35	41	11	44
Skagway	63	39	52	7	52
Glacier Bay	52	24	27	4	29
Sitka	47	23	23	10	26
Haines	23	13	20	3	18
Wrangell	11	8	9	2	9
Petersburg	8	5	8	2	8
Wilderness Areas	4	1	2	3	2
Other Southeast Communities	5	2	3	<1	3
Southcentral					
Anchorage	51	95	87	85	97
Seward	29	44	44	27	53
Kenai	13	28	29	23	34
Palmer	12	30	29	23	33
Homer	11	24	25	24	30
Soldotna	9	23	22	24	25
Valdez	16	22	25	18	28
Prince William Sound	15	23	27	14	33
Wasilla	10	27	25	21	33
Whittier	10	15	17	10	20
Glennallen	11	18	29	11	28
Other Kenai Peninsula Communities	6	12	12	9	13
Wilderness Areas	2	6	5	10	6
Cordova	1	3	3	10	5
Other Southcentral Communities	4	10	8	9	10
Interior/North					
Fairbanks	35	41	87	17	73
Tok	21	24	49	7	41
Nome	2	3	8	<1	5
Kotzebue	2	3	6	<1	4
Prudhoe Bay	1	3	6	<1	3
Wilderness Areas	1	2	4	1	3
Barrow	<1	1	1	<1	1
Other Interior Communities	4	5	13	4	9
Southwest					
Aleutian Islands	-	2	<1	28	1
Kodiak	1	1	1	23	1
King Salmon	<1	2	1	22	<1
Iliamna	-	1	1	15	1
Katmai	<1	1	1	14	<1
Pribilofs	<1	1	1	7	1
Dillingham	<1	1	1	7	1
Bethel	-	<1	-	3	-
Wilderness Areas	<1	1	<1	8	<1
Other Southwest Communities	1	2	1	21	<1
Denali/McKinley	38 %	52 %	77 %	24 %	100 %

Regional Visitors to Attractions

Regional visitors to Alaska attractions shown on Table II-Q is similar to the community visitor overlap patterns on the previous table. For example, of the visitors to Southeast, 24% also visited Portage Glacier, 17% visited Prince William Sound and 24% visited the Transalaska Pipeline.

This table clearly indicates certain patterns of travel for visitors to the state. One-third of visitors to Southcentral visited a number of attractions in Southeast. Almost one-half (49%) of visitors to the Interior visited Portage Glacier. A significant portion of visitors to Denali also visited attractions in Southeast and Southcentral.

These patterns indicate the itineraries of tour packages as well as some of the travel patterns for independent travelers. Instate overnight tours and day cruises to other attractions allowed visitors to see more of the state during their trip.

Table II-Q

Regional Visitors to Attractions All Visitors - Summer 1993 (Percent of Each Region's Visitors)

	South- east (502,800)	South- central (569,300)	Interior/ North (295,100)	South- west (47,100)	Denali/ McKinley (301,200)
Southeast					
Inside Passage	77 %	34 %	43 %	6 %	45 %
Mendenhall Glacier	66	30	38	5	39
Ketchikan Totems	66	28	32	7	4
Skagway's Historic Gold Rush District	59	33	47	6	47
Glacier Bay	51	20	24	4	5
Sitka's Russian Church & Dancers	37	17	17	5	19
Sitka National Historic Park	33	15	15	7	15
Alaska State Museum	29	16	21	7	23
Misty Fjords National Monument	12	4	4	-	5
Chilkat Bald Eagle Preserve	10	6	9	<1	8
Tracy Arm Fjords	5	2	3	3	3
Chilkat Dancers	5	3	3	1	3
Eaglecrest Ski Area	1	<1	<1	-	<1
Southcentral					
Anchorage Area					
Portage Glacier	24	65	49	34	58
Anchorage Museum of History/Art	19	38	33	10	38
Chugach State Park	7	22	17	7	21
Lake Hood Air Harbor	6	19	9	8	14
Alyeska Ski Mine	6	19	13	13	13
St. Nicholas Russian Orthodox Church & Native Spirit Houses	6	16	12	9	14
Potter Point State Game Refuge	2	9	5	6	8
Crow Creek Mine	1	8	4	2	7
Kenai Peninsula					
Kenai River	7	29	17	20	22
Resurrection Bay	8	22	17	9	21
Kenai National Wildlife Refuge	4	16	12	7	16
Kenai Fjords National Monument	4	11	9	6	12
Kachemak Bay	3	8	6	6	7

Table II-Q Continued

Regional Visitors to Attractions
All Visitors - Summer 1993
 (Percent of Each Region's Visitors)

	South- east (502,800)	South- central (569,300)	Interior/ North (295,100)	South- west (47,100)	Denali/ McKinley (301,200)
Southcentral continued					
Prince William Sound	17 %	29 %	25 %	12 %	31 %
Columbia Glacier	15	24	23	14	27
Valdez Pipeline Terminal	11	19	19	10	21
College Fjords	13	17	14	10	18
Matanuska-Susitna Area					
Matanuska Glacier	5	13	12	3	14
Musk Ox Farm	4	11	7	5	9
Hatcher Pass Recreation Area	2	6	3	1	5
Iditarod Museum	2	6	5	1	6
Knik Glacier	1	4	3	1	4
Alaska State Fair	1	4	2	4	3
Independence Mine State Historic Park	1	3	2	1	3
Alaska Historical and Transportation Museum	1	2	2	1	2
Interior/North					
Fairbanks Area					
Transalaska Pipeline	24	27	68	11	48
University of Alaska	22	25	62	13	45
University of Alaska Museum	20	22	56	10	41
Large Animal Research Station	5	6	14	7	10
Agriculture & Forestry (Experimental Farm Station)	2	2	6	<1	4
Geophysical Institute	1	1	3	<1	2
Chena River Trips	15	15	36	-	28
Alaskaland	10	13	35	10	25
Gold Panning Dredges & Saloons	12	13	31	4	23
Hot Springs	3	5	13	6	9
Other Northern Area					
Alaska Highway	19	21	53	9	37
Tetlin National Wildlife Refuge	5	5	13	<1	9
Transalaska Pipeline Haul Road	4	5	12	1	8
Nome - Gold Rush History	2	2	8	<1	3
Prudhoe Bay Oil Fields	2	3	6	-	4
Kotzebue-Eskimo Culture	2	2	6	<1	4
Brooks Range	2	2	5	<1	3
Gates of the Arctic National Park	1	1	3	-	2
Arctic National Wildlife Refuge	1	1	2	-	1
Barrow - Northernmost Point in North America	<1	1	1	<1	1
Southwest					
Aleutian Islands	-	2	-	48	-
Katmai National Park	<1	1	1	31	1
Russian Orthodox Church	<1	1	<1	19	<1
Baranof Museum	1	1	<1	18	<1
Kodiak National Wildlife Refuge	<1	<1	<1	15	<1
Fort Abercrombie	<1	<1	<1	8	<1
Pribilof Islands	<1	<1	<1	6	<1
Denali/McKinley	38 %	52 %	77 %	24 %	100 %

Comparative Regional Use Patterns of All Visitors

Table II-R shows the percent of regional visitors who actually used each of the 40 trip features which they rated in the opinions section of this report.

Cruise ships were the predominant type of lodging used in the Southeast. In the Interior and Southcentral, hotels/motels were most often used. In 1989, resorts/lodges were the major form of lodging for Southwest; during Summer 1993 hotels/motels were most often used by regional visitors. Bed and breakfasts experienced a 50% increase in Southcentral since 1989. RV/Campgrounds were the preferred lodging for visitors to Denali and were also very popular with visitors to the Interior.

Since cruise ships were the most used lodging in Southeast, it was only natural they were the most used mode of transportation as well, followed by air and the Alaska Marine Highway (Ferry). Southcentral utilized all forms of transportation. These visitors were the heaviest users of rental cars and used rental RVs at the same rate as visitors to Denali and the Interior. Visitors to the Interior were the heaviest users of motorcoaches, largely a result of the cruise/tour packages offered through Fairbanks. Southwest visitors primarily utilized air transportation. Denali visitors traveled via motor coaches and trains as well as rental cars.

Southcentral visitors were the dominant users of restaurants and night life, which is to be expected for the region containing the state's largest city. Interior visitors, where Fairbanks is the second largest city in the state, were the next highest users, followed by Denali, Southeast, and Southwest.

Two out of three visitors to Southeast went to a Visitor Information Center. More than one-half of visitors to Southcentral, Interior and Denali utilized a Visitor Information Center, while one out of four visitors to Southwest contacted Visitor Information Centers.

Sightseeing was a major activity for Southeast visitors, particularly flightseeing. Southeast visitors also went to Native cultural presentations, as did visitors to Southcentral and the Interior. The marketing of day tours to package visitors of the Southeast, Southcentral and Interior paid off in their high attendance at the various sightseeing activities. Cultural attractions were heavily attended by these regional visitors as well.

Photography, casual walking, and wildlife viewing were popular activities for visitors. More than one-half of visitors to all regions, except Southwest, engaged in photography. Similar proportions went casual walking and wildlife viewing. Bird watching and fishing were popular activities in available areas. Many Southwest visitors went fishing, wildlife viewing, hiking, casual walking, bird watching and camping; all activities associated with this rugged area. Denali visitors engaged in activities which centered around the Park.

Table II-R

Comparative Regional Use Patterns
Accommodations, Services and Activities
All Visitors - Summer 1993
(Percent of Regional Visitors Using)

	South-east	South-central	Interior/North	South-west	Denali/McKinley
Lodging					
Hotel/Motel	19 %	50 %	50 %	28 %	17 %
Resort/Lodge	5	5	2	18	36
Bed & Breakfast	2	9	5	4	1
RV/Campground	11	16	22	4	23
Cruise Ship	57	12	-	-	-
Ferry	9	<1	-	2	-
Other	1	2	3	17	3
Transportation					
Air	11	17	21	70	4
Ferry	13	5	-	4	-
Motorcoach	7	20	30	1	29
Cruise Ship	50	11	-	-	-
Rental Car	5	27	13	3	12
Rental RV	1	3	3	-	3
Train	6	19	20	-	29
Restaurants/Night life	54	73	67	50	57
Shopping	80	75	62	32	47
Visitor Information Centers	68	58	55	26	57
Sightseeing					
City Tours	51	25	33	4	-
Day Cruises	24	23	-	<1	-
Riverboat Cruises	-	-	36	-	-
Park/Bus Tour	-	-	-	-	70
Flightseeing	26	8	5	7	9
Native Cultural Presentations	34	18	33	-	-
Shows/Alaska Entertainment	30	18	18	<1	-
Other Tours	24	13	7	6	6
Cultural Attractions/Museums	43%	47%	36%	9%	15%
Activities					
Bird Watching	24	22	16	19	27
Camping	11	19	21	11	19
Casual Walking	52	51	45	29	49
Hiking	14	22	15	23	22
Hunting	<1	1	1	3	1
Photography	52	50	49	30	61
Wildlife Viewing	42	41	36	31	55
Canoeing/Kayaking	4	3	1	7	2
Rafting	6	5	2	-	12
Fishing	12	20	7	28	1
Freshwater Fishing	6	18	7	30	1
Saltwater Fishing	12	15	1	11	-
Dogsledding	<1	<1	1	<1	1
Northern Lights Viewing	5	4	5	<1	2
Other	1	3	3	4	3

Visitor Travel Planning by Regional Visitors

Alaska Trip Planning Timelines

The average time elapsed between the decision to visit Alaska and the actual travel date was 7.2 months for all visitors. Those planning to travel to the Interior/North and Denali/McKinley regions had the longest planning time lines, averaging 8.2 and 8.3 months respectively. Approximately one-third of visitors to four of the five regions decided to come to Alaska a year or more in advance. For Southwest, 40% of visitors decided a year or more prior to travel.

Trip arrangements were made 4.4 months in advance, on the average. Visitors to Southeast took the longest time at 5.2 months, a factor which is likely to be related to cruise travel. Southcentral visitors, who used primarily Domestic Air as their transportation mode, had the shortest arrangement time of 4.3 months. More than 50% of visitors to Southcentral made their trip arrangements in three months or less. Almost 60% of visitors to Southwest took only three months or less for their arrangements. More than one-third of visitors to the Interior/North and Denali/McKinley took four to six months to plan and arrange their travel to Alaska.

Graph II-E

Alaska Planning Timelines
All Visitors - Summer 1993
(By Region Visited)

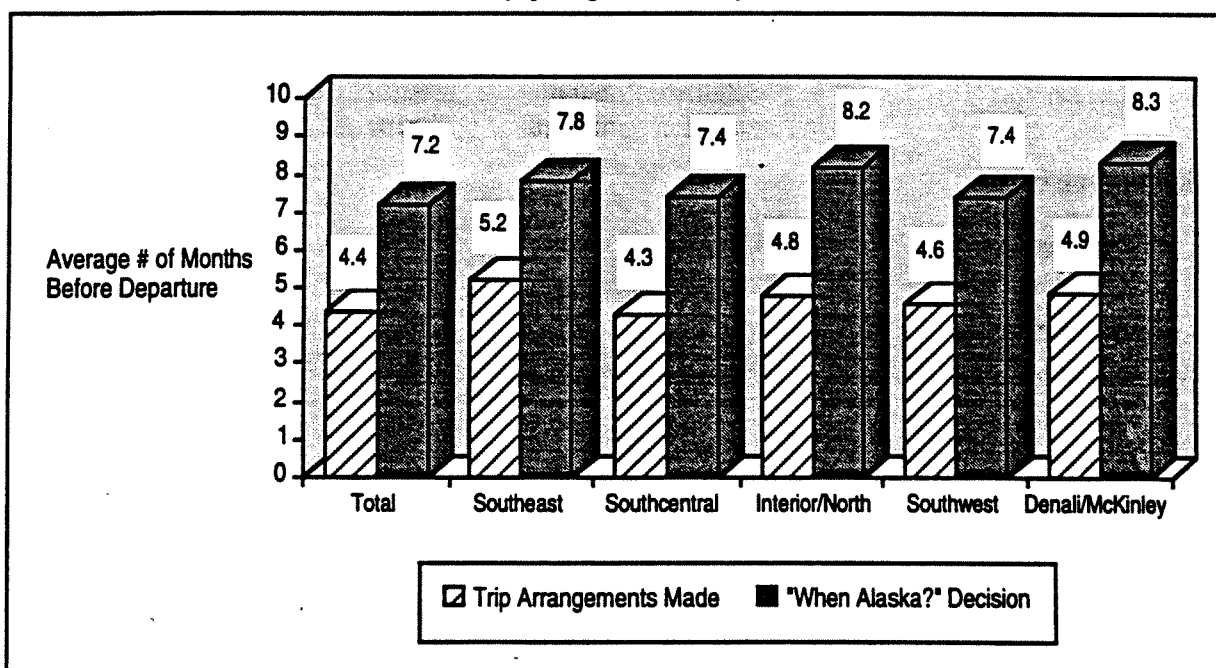


Table II-S

**Lead Time For Alaska Season/Year Decision
By Region Visited
All Visitors - Summer 1993
(Percent of Each Region's Visitors)**

	South- east	South- central	Interior/ North	South- west	Denali/ McKinley
Months Before Trip					
1 Month or Less	8%	13%	8%	16%	8%
2 - 3 Months	18	17	17	28	14
4 - 5 Months	9	9	10	1	10
6 - 7 Months	21	21	22	13	22
8 - 9 Months	12	9	10	1	11
10 - 12 Months	20	18	18	24	20
More Than 1 Year	12	12	14	17	14

Table II-T

**Lead Time For Trip Arrangements
By Region Visited
All Visitors - Summer 1993
(Percent of Each Region's Visitors)**

	South- east	South- central	Interior/ North	South- west	Denali/ McKinley
Months Before Trip					
1 Month or Less	13%	21%	17%	34%	11%
2 - 3 Months	27	32	28	24	34
4 - 5 Months	12	12	13	6	13
6 - 7 Months	27	20	26	20	26
8 - 9 Months	12	8	7	4	8
10 - 12 Months	6	6	7	6	6
More Than 1 Year	2	1	2	5	2

Trip Arrangements

Trip arrangements provide another perspective on travel type. The majority of visitors to Southeast (63%) purchased a package in advance of their trip, while in Southcentral one-third (32%) of the visitors purchased a package trip. Visitors to the Interior/North favored either a completely independent travel plan with no packaged trip or instate tour (39%) or buying a complete package trip in advance for the entire trip (36%). The majority of visitors to Southwest did not purchase any package trip (74%). Denali/McKinley had an equitable mix of visitors with 29% not making any purchases of a package trip, 39% traveling on a package trip, and 23% purchasing instate tours.

Visitors who traveled according to their own plans were most likely to purchase instate tours in Denali/McKinley, Interior/North and Southcentral. Visitors to Southwest also purchased a package trip in advance for some of their trip, suggesting the area may attract Business/Pleasure visitors.

Table II-U

Trip Arrangements By Region Visited All Visitors - Summer 1993

How Did You Make Arrangements For Your Alaska Trip?	South- east	South- central	Interior/ North	South- west	Denali/ McKinley
1. Did not buy a packaged trip or instate tour while in Alaska	20 %	44 %	39 %	74 %	29 %
2. Bought a packaged trip in advance for the entire Alaska trip	63	32	36	10	39
3. Did not buy a packaged trip in advance for the Alaska trip, but bought tours instate	9	15	18	2	23
4. Bought a packaged trip in advance for some of the Alaska trip	8	9	7	13	9
5. Other	-	<1	<1	-	-

Alaska Trip Decision Criteria

Personal reasons were the primary factors, in four of the five regions, for visitors' decisions about why they chose to visit Alaska this particular year. These reasons included family/friend related reasons, such as being able to travel with a particular partner. For many visitors, wanting to visit Alaska has been a long time desire; this was particularly true for visitors to the Interior/North and Denali/McKinley. Visitors to the Southeast often were prompted to come as a result of a special occasion, one of the most popular reasons being that the cruise was a gift for a special wedding anniversary or as a honeymoon. Timing considerations was an important factor for visitors to the Interior/North and Denali/McKinley, such as just starting retirement.

Business was the primary deciding factor for visitors to Southwest, followed by attractions/appeal of Alaska, such as the fishing. The fourth most mentioned reason for these visitors was to see family and friends.

The attractions/appeal of Alaska, such as its glaciers, wildlife and scenery, was the second most mentioned reason for visitors to Southeast, Interior/North and Denali/McKinley. Business and visiting family and friends were tied as the second most mentioned reasons for visitors to Southcentral, followed by attractions/appeal of Alaska.

Other reasons mentioned which prompted visitors to visit Alaska included recommendations by others. Word of mouth is an important advertising factor and has consistently been mentioned by visitors. Price/discount considerations and advertising/promotion were also mentioned by visitors as being able to influence their decision as to when they would visit Alaska.

In 1989, personal reasons was the most commonly mentioned criteria in four of five regions. Equal percentages of Southwest visitors during Summer 1989 mentioned visiting friends/relatives and attractions/appeal as the main reason for what prompted them to visit Alaska.

Table II-V

**Main Reason For "When Alaska?" Decision
By Region Visited
All Visitors - Summer 1993
(Percent of Each Region's Visitors)**

	South- east	South- central	Interior/ North	South- west	Denali/ McKinley
1. Personal Reasons	59%	41%	54%	23%	57%
Family/Friend Related Reasons	10	7	8	9	8
Long Time Desire	10	6	9	4	9
Special Occasion	8	3	3	—	4
Timing Considerations	7	6	8	2	9
Stage In Life	5	4	7	1	6
Financial	3	2	3	—	3
Never Been There	4	3	3	<1	4
Group Travel Opportunity	3	2	2	—	3
Wanted To Cruise	2	<1	—	—	—
Other	7	7	10	7	11
2. Business	4	15	11	34	4
3. Visit Friends/Relatives	4	15	9	14	10
4. Attractions/Appeal of Alaska	15	13	12	24	14
Natural Attractions	8	7	8	4	10
Fishing	4	4	2	16	2
Adventure Travel	<1	<1	<1	—	<1
Other	<1	<1	<1	—	<1
5. Recommended By Others	7	6	6	6	6
6. Price/Discount Considerations	5	4	3	<1	5
7. Advertising/Promotion	3	2	2	1	2
8. Visit All 50 States	<1	<1	<1	—	<1
9. Other	5	4	6	2	3

Travel History of Alaska Visitors

Visitors to all regions of Alaska were well traveled. The top five most visited destinations in the past five years were similar for all regions. Yet there have been some distinctive changes in these travel patterns since 1989. During Summer 1989, Europe headed the list as the most visited destination in the past five years for four of the five regions. During Summer 1993, visitors indicated that the Southern States as a group were among the most visited destinations. This is to be expected with the development of Disney World and other popular vacation attractions located in the southern region of the U.S.

The Pacific Coast States were always popular vacation destinations for Alaska's visitors. Again there are a number of attractions that bring visitors to these states. Visitors to Alaska's Southwest region gave the Pacific Coast States as the most visited destination in the past five years. This may be due to the similarities in available recreational activities, such as fishing, kayaking and camping. Access to Alaska from the Pacific Coast States probably contributed to this travel history pattern as well.

The Mountain States ranked as the third most visited destinations for all regions. In 1989, Arizona was the eleventh most visited destination and Nevada was the twelfth.

Europe, the most visited vacation destination in 1989, was the fourth most visited destination for Alaska's visitors, across all regions. Approximately one-third of all visitors to all regions visited Europe in the past five years.

Canada was the fifth most visited destination for three regions: Southeast, Interior/North, and Denali/McKinley. The Caribbean tied for the fifth most visited destination for visitors to the Southeast. Given that the majority of visitors to Southeast used cruise ships as their primary transportation mode, it is understandable for the Caribbean to be in the top five, since it offers a number of cruise itineraries. For visitors to Southcentral, the next most visited destinations were the Eastern States, Caribbean and the Midwestern States. Visitors to the Southwest region visited the Midwestern States, Australia/New Zealand, Mexico, the Caribbean and/or the Eastern States within the last five years.

Table II-W

Travel History of Alaska Visitors
All Visitors - Summer 1993
Past Five Years - Vacation Destinations
(Percent of Each Region's Visitors)

	South-east	South-central	Interior/North	South-west	Denali/McKinley
1. Southern States	55 %	64 %	56 %	60 %	61 %
Florida	23	26	22	27	25
Texas	5	7	8	11	8
2. Pacific Coast States	52	61	51	72	52
Hawaii	18	21	16	41	18
California	20	26	21	21	21
Washington/Oregon	14	14	14	10	13
3. Mountain States	38	44	45	39	44
Arizona	11	12	12	9	14
Nevada	6	6	5	6	6
Colorado	6	7	8	4	6
Utah	4	4	4	8	3
4. Europe	33	33	34	36	33
Great Britain & Ireland	14	13	13	21	13
France	8	8	7	1	8
Germany	5	6	6	1	5
5. Canada	26	18	26	9	25
British Columbia	7	3	5	3	4
Alberta	6	3	5	3	5
6. Caribbean	26	19	15	13	17
7. Mexico	19	16	14	15	16
8. Eastern States	16	20	16	11	15
9. Midwestern States	14	18	19	17	17
10. Australia/New Zealand	10	11	12	17	13
11. ALASKA	5	6	6	2	5
12. China	4	4	4	4	4
13. South Pacific	3	3	4	6	3
14. Southeast Asia/India	2	4	4	<1	5
15. Japan/Korea	2	4	3	3	3
16. Israel	2	1	2	-	1

Visitor Demographics

Education

Visitors to Alaska tended to be well-educated, with visitors to Southwest the most highly educated of all regional visitors. Nearly one-half of visitors to all regions graduated from college.

Household Income

Visitors to Southwest also reported the highest average household income at \$63,600, with almost one-third having an household income exceeding \$75,000. Visitors to the Interior/North had the lowest average household income (\$56,900). Visitors to Southeast and Southcentral both averaged \$61,100, while visitors to Denali/McKinley averaged \$58,000. Overall, Alaska visitors tended to have an above average household income.

Visitor Age

Southeast visitors had the highest average age (55 years), while Southwest visitors had the lowest average age (46 years). Almost two-thirds of visitors to Southeast were over 55 years of age, while four in ten visitors to Southwest were between 25 and 44 years of age.

Visitor Gender

A majority of visitors to Southwest were male (73%), while the ratio of males to females was nearly one-to-one for visitors to all other regions.

Visitor Employment

Southeast was the only region visited by more retired persons than employed persons. More than one-half of visitors to Southcentral were employed, while just under one-half of visitors to the Interior/North and Denali/McKinley were employed. Eight out of every ten visitors to Southwest were employed.

Visitor Origin

The West was an important producer of visitors for all regions, especially Southwest. The majority of visitors to Southwest (89%) came from the United States. Southeast drew a significant number of its visitors from the Southern part of the U.S., as did Southcentral and Denali/McKinley. Midwesterners tended to visit the Interior/North. Southeast had the largest number of visitors from outside the U.S. (18%), followed by Denali/McKinley (14%).

Visitors from Canada, bordering the Southeast region, were the most frequent visitors to that region.

Table II-AA

**Demographics
By Region Visited
All Visitors - Summer 1993
(Percent of Each Region's Visitors)**

	South- east	South- central	Interior/ North	South- west	Denali/ McKinley
Visitor Education					
Not High School Graduates	5 %	4 %	5 %	4 %	5 %
High School Graduates	21	19	22	11	23
1 - 3 Years College	23	24	26	23	22
College Graduate	24	25	23	37	25
Attended or Completed Graduate School	27	29	25	25	25
Visitor Household Income - Average	\$61,100	\$61,100	\$56,900	\$63,600	\$58,000
Under \$25,000	9 %	8 %	8 %	5 %	8 %
\$25,000 - \$34,999	15	16	22	15	19
\$35,000 - \$49,999	23	20	23	25	25
\$50,000 - \$74,999	24	25	22	20	22
\$75,000 - \$99,999	16	18	15	19	15
\$100,000 and Over	14	12	10	15	11
Visitor Age - Average	55	50	52	46	52
Under 18 Years	4 %	5 %	5 %	3 %	5 %
18 - 24 Years	2	1	3	2	4
25 - 34 Years	6	11	9	17	10
35 - 44 Years	10	14	10	23	9
45 - 54 Years	16	18	16	24	17
55 - 64 Years	26	22	26	8	25
65 - 74 Years	28	21	25	18	24
75+ Years	8	5	6	6	6
Visitor Gender					
Male	47 %	53 %	49 %	73 %	48 %
Female	53	47	51	27	52
Visitor Employment					
Employed	42 %	53 %	47 %	81 %	46 %
Retired	48	37	43	25	43
Other	9	10	10	7	11
Visitor Origin					
West	31 %	38 %	32 %	51 %	29 %
California	12	14	10	19	12
Washington	7	9	8	19	4
Midwest	15	16	21	12	19
South	22	21	19	19	23
East	14	13	13	7	15
Canada	11	4	6	3	4
Overseas	7	8	9	7	10
Germany/Switzerland/Austria	3	3	4	4	4
Great Britain	2	1	1	—	1
Japan	<1	1	<1	3	1
Australia/New Zealand	2	2	3	—	2



Chapter III: Vacation/Pleasure Visitors

Visitor Opinions

Visitor Travel Patterns

Visitor Trip Planning

Demographics

Introduction

Vacation/Pleasure visitors, Alaska's primary visitor market, represented 630,000 visitors during Summer 1993. They were the greatest contributors to Alaska's economy spending \$478 million, nearly 80% of all visitor expenditures to the state. Vacation/Pleasure visitors also demonstrate diverse behavior patterns compared to All Visitors to the state. For these reasons, it is important to have a complete understanding of this market group. Visitor industry marketers can develop more effective campaigns to continue to entice visitors to Alaska with valuable data at their finger tips.

This chapter provides a detailed analysis of Vacation/Pleasure visitors – their opinions of their Alaska trip, travel patterns, trip planning, and demographic information.

Vacation/Pleasure Visitor Opinions

Overall Alaska Trip Ratings

Vacation/Pleasure (VPs) visitors were pleased with their Alaska trip giving an average rating for their overall trip of 6.2 on a scale of one to seven (1= poor, 7= excellent). The bulk of VPs (81%) assigned their Alaska trip a six or seven. Only 1% gave it a three or less. Both Cruise and Alaska Marine Highway (Ferry) visitors rated Alaska very highly (6.3). Domestic and International Air visitors gave very good average overall trip ratings of 6.2 and 5.9, respectively. VPs from Australia/New Zealand gave the highest rating overall (6.5) and Canadians the lowest (5.9).

Alaska's value for the money ratings were very good ranging between 6.2 and 5.1, with an overall rating among VPs of 5.4. More than one-half assigned a six or seven value for the money rating. Cruise Ship travelers assigned the highest value for money ratings (5.8). International Air (5.2) and Highway (5.0) visitors gave ratings well above average. Japanese visitors gave a lower rating of 4.7. Japanese visitors demand high quality in all aspects of their travel experience. It is possible the more rugged Alaska atmosphere may not always meet these exceptional standards.

Alaska's compared to expectations rating was very high averaging an overall 5.9. Alaska exceeded the expectations of most VPs with more than two-thirds rating their trip a six or seven. Only 1% stated their trip was below their expectations. Once again Cruise visitors were most pleased assigning an overall compared to expectations value of 6.0. Domestic air visitors followed with a 5.9 rating.

Graph III-A

**Average Alaska Trip Ratings
Vacation/Pleasure Visitors - Summer 1993**

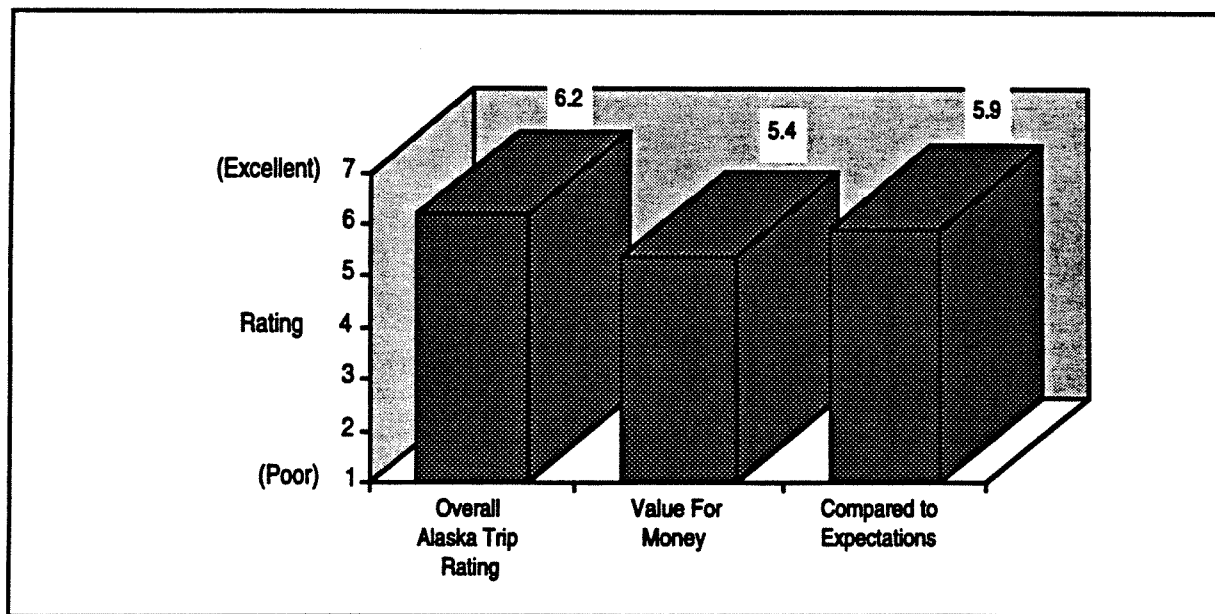


Table III-A

Average Alaska Trip Ratings
Vacation/Pleasure Visitors - Summer 1993
 (1 = Poor and 7 = Excellent on 1 to 7 Scale)

Visitor/Trip Characteristics	Overall Alaska Trip Rating	Value For Money	Compared To Expectations
Total	6.2	5.4	5.9
Entry Mode			
Domestic Air	6.1	5.1	5.8
Cruise Ship	6.3	5.9	6.0
Highway ¹	6.0	5.1	5.5
Ferry	6.2	5.1	5.8
International Air	6.1	5.0	5.6
Mode Use			
Domestic Air	6.2	5.3	5.9
Cruise Ship	6.3	5.8	6.0
Highway	6.0	5.0	5.5
Ferry	6.3	5.1	5.9
International Air	5.9	5.2	5.4
Intended Travel Type			
Package	6.2	5.7	6.0
Independent	6.0	5.1	5.8
Inde-Package ²	6.2	5.0	5.7
Origin			
United States Total	6.2	5.4	5.9
West	6.1	5.4	5.8
California	6.1	5.6	5.8
Washington	6.0	5.2	5.9
South	6.2	5.5	5.9
Midwest	6.3	5.4	6.1
East	6.3	5.5	6.0
Canada	5.9	5.5	5.6
Overseas	6.4	5.3	5.8
Germany/Switzerland/Austria	6.4	5.1	5.6
Great Britain	6.5	6.0	6.1
Japan	6.1	4.7	5.6
Australia/New Zealand	6.5	5.2	5.9

¹ Highway mode includes personal vehicles only. Not included are motorcoaches and trucks.
² Inde-Package visitors are independents who purchased sightseeing tours during their trip.

Value for the Money Ratings

Vacation/Pleasure visitors were asked to rate the value for the money of nine aspects of their Alaska trip compared to other travel destinations on a one (poor) to seven (excellent) scale. As in past years, the highest rating (6.2) went to the friendliness/helpfulness of Alaskans. Sightseeing/attractions in Alaska were the next best value at 5.9. VPs rated accommodations and restaurants significantly lower, consistent with 1985 and 1989 ratings. Transportation and activities received ratings of 5.5 and 5.4.

Cruise and Package visitors gave the highest value for money ratings across almost all aspects of their Alaska trip. These high ratings could be attributed to the structured trip developed by the cruise industry. Highway visitors were most critical of transportation (ranging between 4.4 and 4.8), perhaps a reflection of road conditions.

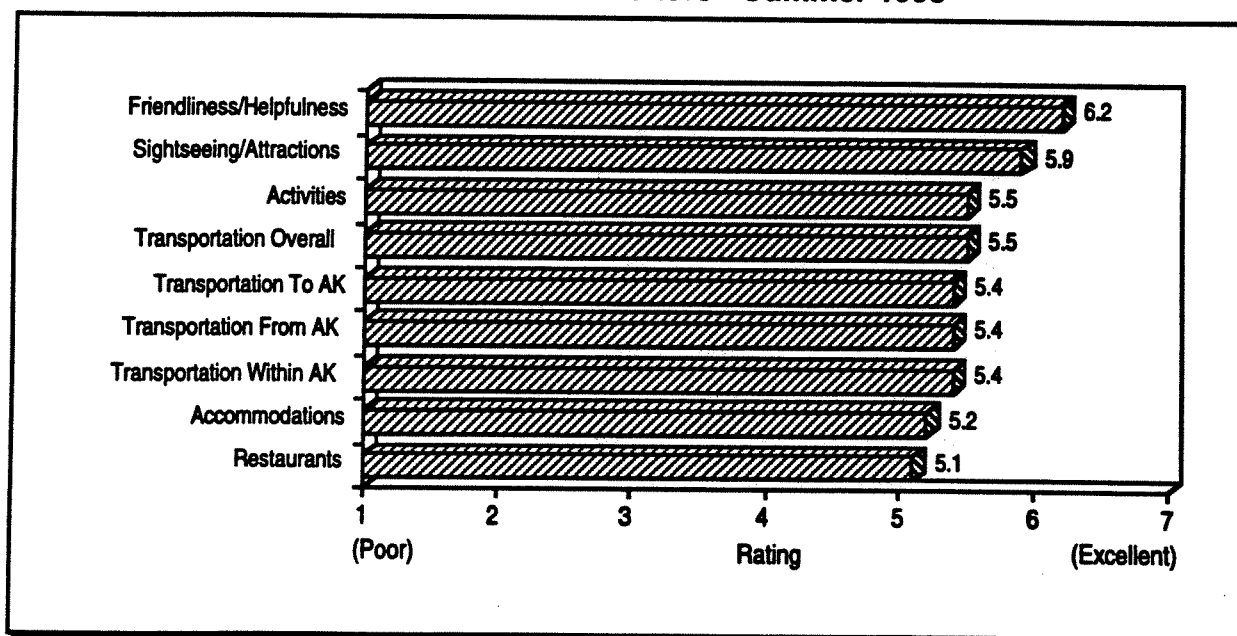
International Air visitors' value for money ratings ranged between 6.1 and 4.5. They assigned the lowest rating (4.5) to restaurants. Most international travelers are exposed to a variety of well prepared cuisine. Perhaps Alaska restaurants would need to upgrade in this area to meet standards of more sophisticated palates.

Package visitors overall were very pleased assigning high value for money ratings in all categories. Inde-Package visitors rated transportation, accommodations and restaurants a little lower than other VPs.

United States visitors were generally pleased with their Alaska trip in terms of value for the money. Visitors from Florida and the East rated friendliness the highest, 6.6 and 6.4 respectively.

Graph III-B

**Value for Money Ratings
Accommodations, Services and Activities
Vacation/Pleasure Visitors - Summer 1993**



Visitors from Great Britain tended to be pleased with the value of their Alaska trip assigning positive ratings to all categories. Japanese visitors tended to give lower value for money ratings except in the friendliness category. Japanese travelers desire the highest quality in all experiences. It is possible that Alaska's infrastructure has not developed enough to meet their high standards.

Table III-B

Value for Money Ratings
Accommodations, Services and Activities
Vacation/Pleasure Visitors - Summer 1993
(1 = Poor and 7 = Excellent on 1 to 7 Scale)

	Friend- liness/ Helpful- ness	Sight- seeing Attrac- tions	Activ- ities	Transpor- tation Overall	Trans- portation To	Transpor- tation From	Trans- portation Within	Accom- moda- tions	Res- tau- rants
Mode Use									
Domestic Air	6.1	5.9	5.5	5.5	5.5	5.5	5.4	5.1	5.0
Cruise Ship	6.4	5.8	5.6	5.8	5.7	5.7	5.8	5.6	5.4
Highway ¹	6.0	5.8	5.4	4.7	4.4	4.4	4.8	4.6	4.7
Ferry	6.1	5.9	5.1	5.1	5.3	5.1	5.2	4.7	4.8
International Air	6.1	5.5	5.0	4.9	4.7	4.8	5.0	4.9	4.5
Travel Type									
Package	6.3	5.9	5.6	5.8	5.7	5.6	5.7	5.6	5.4
Independent	6.0	5.9	5.3	5.1	5.2	5.3	5.1	4.7	4.7
Inde-Package ²	6.1	5.9	5.5	4.7	4.7	4.7	4.7	4.5	4.7
Origin									
United States Total	6.2	5.9	5.6	5.5	5.5	5.5	5.4	5.2	5.1
West	6.2	5.9	5.6	5.5	5.5	5.5	5.4	5.2	5.2
California	6.2	5.9	5.8	5.4	5.6	5.6	5.5	5.1	5.2
Washington	6.0	6.0	5.4	5.7	5.4	5.3	5.2	5.0	4.9
South	6.3	5.8	5.6	5.4	5.5	5.5	5.4	5.1	4.9
Midwest	6.2	6.0	5.4	5.5	5.2	5.3	5.4	5.2	5.1
East	6.4	5.9	5.8	5.7	5.7	5.6	5.8	5.4	5.3
Canada	5.9	5.6	5.2	5.6	5.5	5.4	5.4	5.3	4.9
Overseas	6.2	5.8	5.2	5.2	4.9	4.9	5.1	4.9	4.9
G/S/A ³	6.2	5.7	4.8	4.9	4.7	4.6	5.1	4.7	4.5
Great Britain	6.3	6.4	5.9	5.6	5.7	5.7	5.6	5.5	5.3
Japan	6.0	5.4	5.4	4.3	4.5	4.3	4.6	4.5	4.5
Australia/ Zealand	6.2	5.6	5.0	5.4	4.9	4.6	5.0	4.5	4.9

¹ Highway mode includes personal vehicles only. Not included are motorcoaches and trucks.

² Inde-Package visitors are independents who purchased sightseeing tours during their trip.

³ Germany/Switzerland/Austria

Likelihood of Visiting Alaska Again

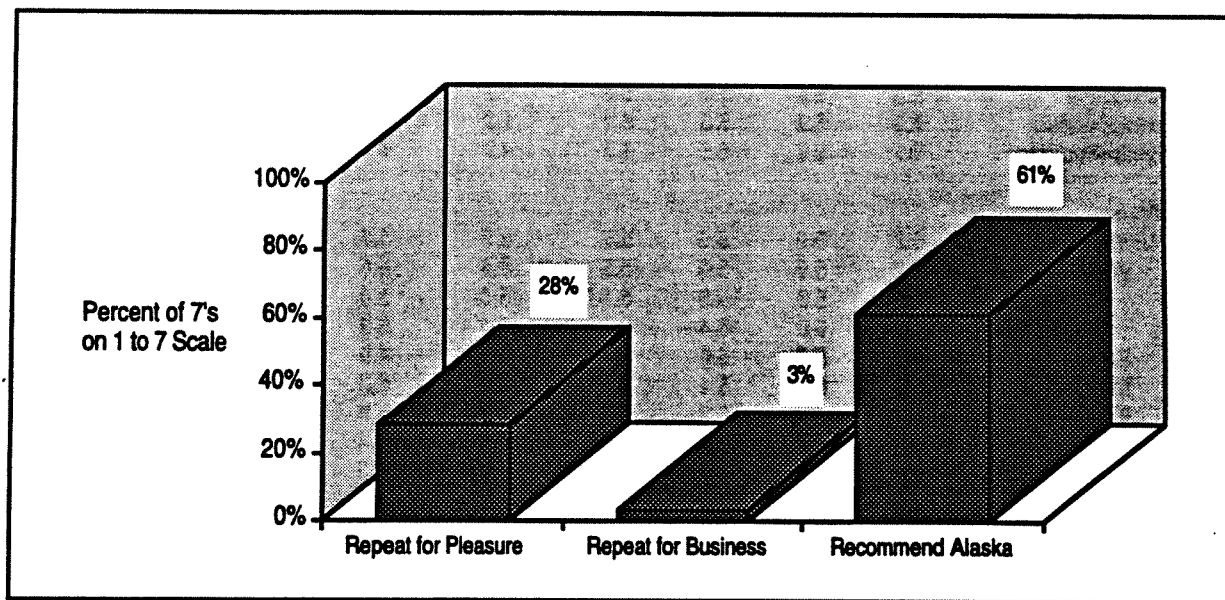
Alaska left a lasting impression on Vacation/Pleasure visitors, with nearly three of ten saying they were very likely to return for pleasure on a one (unlikely) to seven (very likely) scale within the next five years. More than one-third of Highway VPs were very likely to return again. Three of ten Domestic Air and International Air VPs said they would return.

Nearly one-half of Independent VPs indicated they would travel to Alaska for pleasure. Fewer Inde-Package (30%) visitors indicated a strong likelihood of repeating a visit to Alaska. Package (18%) visitors comprised the smallest group of probable repeat visitors.

The majority of VPs (61%) were pleased with their Alaska trip and indicated they would recommend Alaska to friends, relatives and business associates. Only 1% said they would not recommend Alaska as a vacation destination.

Graph III-C

**Likelihood of Visiting Alaska Again
For Pleasure and For Business
Vacation/Pleasure Visitors - Summer 1993**



Misconceptions About Alaska

Many visitors to Alaska come with preconceived notions that are cleared up once they arrive. Nearly seven of ten Alaska VPs experienced a more positive Alaska experience than had been anticipated. Alaska's weather was much better than most visitors (45%) expected. Summer 1993 was exceptional in terms of weather and is the likely reason for the positive remarks which were significantly higher than in 1989.

VPs from Great Britain were the most pleasantly surprised with nearly all (98%) stating that their Alaska trip was better than they had expected. This was also true for 85% of VPs from Germany/Switzerland/Austria. Australia/New Zealand visitors' weather perceptions improved the most (75%).

Only 15% of Summer 1993 VPs found Alaska to be worse than they anticipated. Visitor disappointment was due to not seeing as much wildlife as they anticipated, and a perception that Alaska was more crowded and developed than expected. A very few commented negatively on the appeal of Alaska, the prices they paid in state, on the roads and weather.

Table III-C

Biggest Misconception Cleared Up By Visit to Alaska Vacation/Pleasure Visitors - Summer 1993

Better Than Expected	67%
Weather	45
State Bigger Than Thought	6
Appeal of Alaska/Attractions	6
Roads	3
Accommodations/Transportation Facilities	3
Prices/Cost	1
Friendlier	1
Other	2
Different Than Expected	18%
Worse Than Expected	15%
Appeal of Alaska/Attractions	13
Prices/Cost	1
Accommodations/Transportation Facilities	-
Roads	1
Weather	-
Other	2

What Did You Plan To Do In Alaska That You Did NOT Do?

Visitors were asked to indicate what of their planned activities they were unable to do on their Alaska trip. One-quarter of VPs indicated they were unable to travel to some of the towns they had hoped to visit. Nearly 40% of Inde-Package visitors and 30% of Independents were unable to fit in specific communities during their Alaska trip. Europeans and domestic visitors from the East were the most likely to miss areas of the state on their trip. It is possible these visitors may not have been aware of the state's geography and planned itineraries they were unable to meet given the distance and time involved in getting from one location to the next.

Fifteen percent of VPs were unable to fit fishing into their trip. Visitors from the Yukon (48%) and Japan (36%) did not get their planned fishing trip in during their Alaska visit. More than two of ten Independent visitors were unable to fish. Fishing requires some preplanning including the purchase of a fishing license and knowledge of which areas are open. Fishing charter trips often require advance booking.

Other activities dropped from planned itineraries included visiting specific attractions and taking day trips. Wildlife viewing, recreational activities, and flightseeing were also eliminated by at least 10% of VPs.

Table III-D

What Did You Plan To Do In Alaska That You Did NOT Do? Vacation/Pleasure Visitors - Summer 1993

Planned To Do While In Alaska, But Did NOT Do:	Percent of Visitors
1. Include Additional Towns/Areas	25%
2. Fish	15
3. See Additional Attractions/Day Trips	15
4. See Wildlife	11
5. Do Recreational Activities	11
6. Flightsee	10
7. Take Train	2
8. Change Length of Stay or Budget Time Differently	1
9. Make Specific Purchases/Shop in General	1
10. Take Ferry	1
11. Enjoy Night-life/Entertainment	<1
12. Other	7

What Did You Do In Alaska That You Had NOT Planned To Do?

Many VP visitors added unplanned attractions to their trips. More than three of ten stated they saw additional attractions or added day excursions on their trip. Most Inde-Package (40%) and Package (35%) visitors were likely to add an extra attraction to their itinerary. This was also true for visitors from the Eastern U.S. (43%) and Canadians (34%).

Recreational activities were also added to trip itineraries. One-third of European visitors scheduled additional recreational activities. Among domestic visitors, visitors from the East (27%) and those from the Western U.S. (22%) were likely to add more activities to their schedules than they had originally planned. Flightseeing was also added to schedules by 16% of all summer VPs.

Other VPs found they were able to visit areas they had not previously included on their original itinerary, made unplanned purchases or added a fishing trip to their schedules.

Table III-E

What Did You Do In Alaska That You Had NOT Planned To Do? Vacation/Pleasure Visitors - Summer 1993

Did NOT Plan To Do While In Alaska, But Did Do:	Percent of Visitors
1. Additional Attractions/Day Trips	31%
2. Recreational Activities	18
3. Flightseeing	16
4. Include Additional Towns/Areas	7
5. Make Specific Purchases/Shop In General	6
6. Fishing	4
7. See Wildlife	2
8. Night-life/Entertainment	2
9. Changed Length of Stay/Budgeted Time Differently	1
10. Take Train	1
11. Take Ferry	<1
12. Wilderness Camping	<1
13. Other	12

Vacation/Pleasure Visitor Travel Patterns

Visitor entry and exit data presented here is slightly different than that presented in *Alaska Visitor Arrivals, Summer 1993*. The arrivals document reflected information based on intended behavior when visitors first entered the state. The table below is based on actual behavior.

Entry and Exit Modes

Entry and exit mode travel patterns of VP visitors are similar to those of All visitors to the state, with some minor variations. Similar to All Visitors the majority of VPs entered (40%) and exited (42%) Alaska via Domestic Air. However, many VPs chose to cruise in and out of Alaska, with nearly four of ten cruising into the state and more than one-third sailing out.

Highway visitors exhibited the same pattern entering and exiting the state. Only 4% entered by the Alaska Marine Highway (Ferry) and 1% by International Air. State Ferry and International Air exit modes resembled the entry patterns.

Table III-F

Entry and Exit Modes (Excludes Seasonal Workers) Vacation/Pleasure Visitors - Summer 1993

Mode	Entering V/P Visitors	Percent	Exiting V/P Visitors	Percent
Domestic Air	254,800	40%	266,100	42%
Cruise Ship	244,700	39	224,100	36
Highway ¹	97,300	15	95,700	15
Ferry	24,700	4	28,500	5
International Air	9,300	1	12,800	2
Other	-	-	600	<1
Unknown	-	-	3,100	<1
Total	630,900	100%	630,900	100%

¹ Highway mode includes personal vehicles only. Not included are motorcoaches and trucks.

Total Mode Market

Total VP mode market data is useful to marketers, designating the total value of a particular transportation mode to Alaska tourism. VP mode market consists of the total number of visitors entering, exiting or traveling both ways on the same transportation mode. For instance, 350,000 VPs used Domestic Air in Summer 1993. This additional calculation increased the true size of the market from 40% (254,800, entry only) to 56% of all Vacation/Pleasure visitors.

Half of the market utilized cruise ships in Summer 1993, similar to 1989. Highway visitors comprised nearly two of ten visitors to Alaska. The State Ferry market impact increased to nearly 46,000 when including the total market. The International market totaled nearly 15,000 visitors.

Some Alaska VPs added variety to their trip by changing transportation modes. The majority of the Ferry market (84%) changed modes. Highway visitors were the least likely to change modes with only 28% of the market doing so.

Table III-G

Mode Market Size (Excludes Seasonal Workers) Vacation/Pleasure Visitors - Summer 1993

Mode	Entering V/P Visitors Only	Exiting V/P Visitors Only	V/P Visitors Entering and Exiting	Total V/P Mode Markets
Domestic Air	85,300	96,600	169,500	351,400
Cruise Ship	89,700	71,700	152,400	313,800
Highway ¹	16,100	15,000	80,700	111,800
Ferry	17,200	21,000	7,500	45,700
International Air	2,000	5,500	7,300	14,800

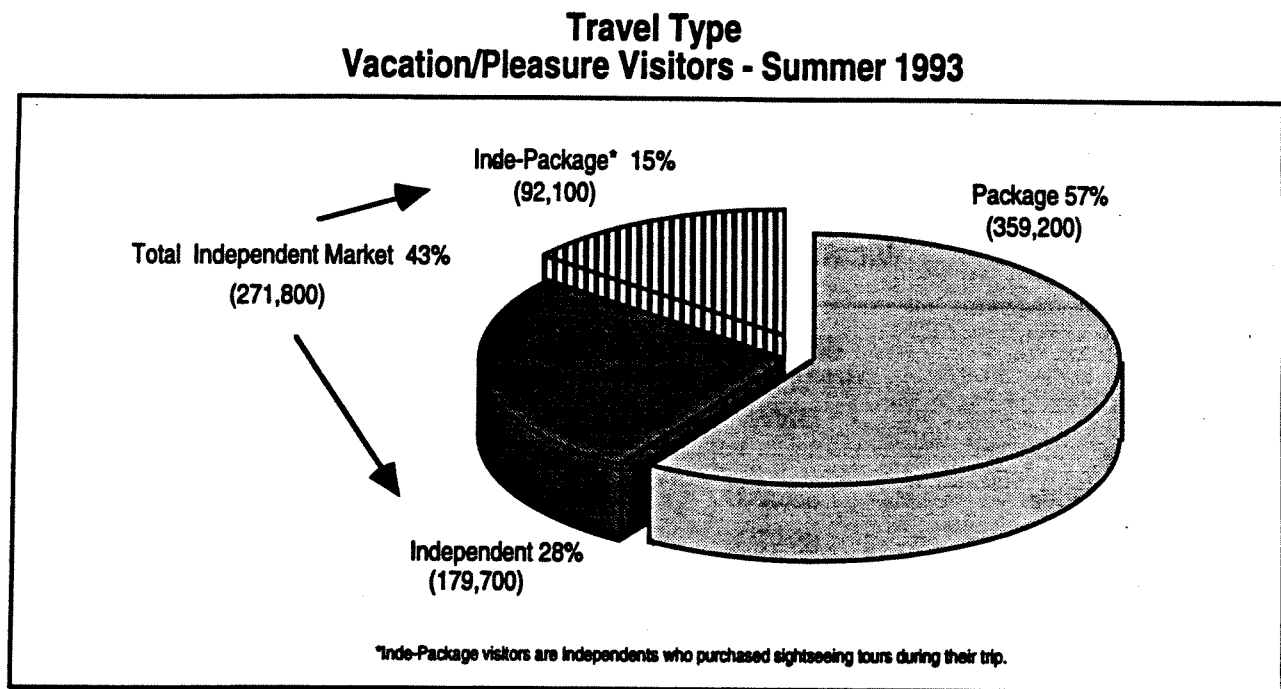
¹ Highway mode includes personal vehicles only. Not included are motorcoaches and trucks.

Vacation/Pleasure Visitor Travel Type

The majority of VP visitors (57%) traveled on a package trip (a trip that is prepaid and prearranged prior to arriving in Alaska). More than four in ten Package VPs were on a round-trip cruise. Nearly one-third of package visitors took a package trip that included cruising and a land tour combined.

Independent visitors totaled 43% of all VPs. In this group 28% were completely Independent while 15% were on an Inde-Package trip. The Inde-Package visitor makes trip arrangements independently and purchases package tours instate. These could include day tours or cruises and overnight tours.

Graph III-D



Length of Stay of Vacation/Pleasure Visitors

Vacation/Pleasure visitors average nine nights in Alaska similar to the average length of stay by All Visitors. Nearly eight of ten stay between three and thirteen nights, accommodating the length of most of the common tour packages. Most VPs (41%) stayed in Alaska for about one week. This is a slight change from 1989 when the greatest portion of VPs tended to stay for a two week period. Travel patterns are changing and the trend is toward shorter, more frequent trips.

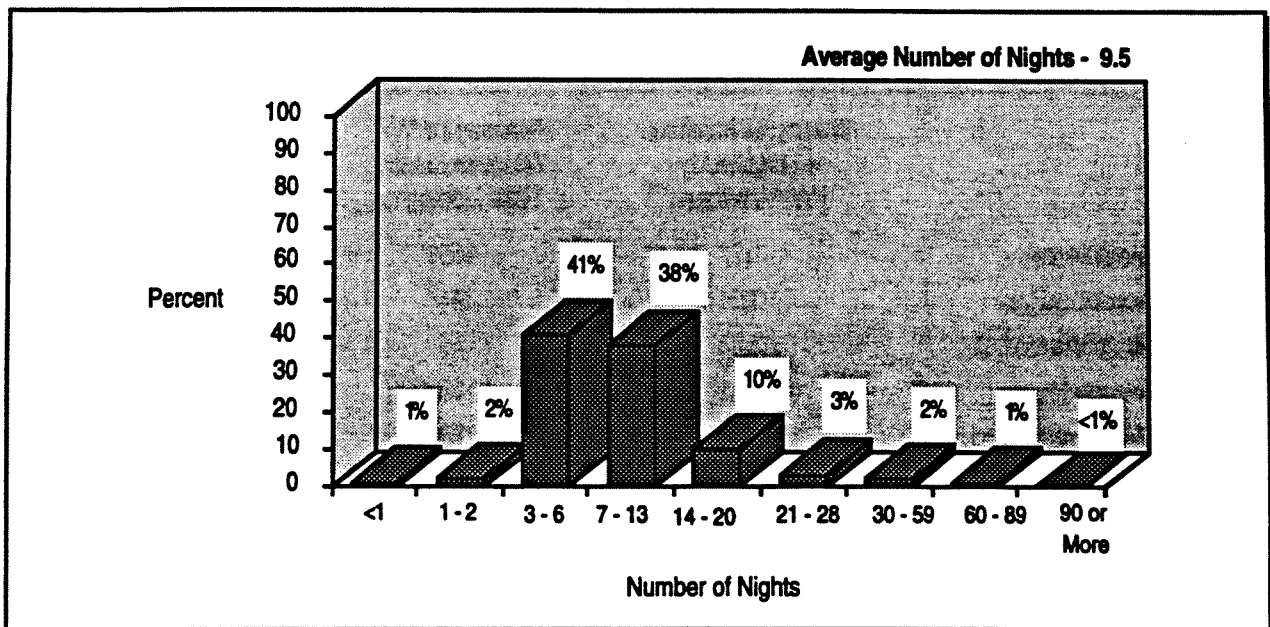
Ferry users averaged the greatest length of time (16.2) in Alaska. Highway and International users were next in line averaging nearly 15 nights in the state, up significantly from 1989.

Among travel types Inde-Package visitors spent the most time in Alaska (14.7 nights), twice as long as Package visitors. Completely Independent visitors averaged 11.4 nights on their Alaska trip.

German/Swiss/Austrian visitors averaged the longest length of stay in Alaska (13.3 nights). Among domestic visitors Easterners and Midwesterners averaged the greatest amount of time.

Graph III-E

Length of Stay
Vacation/Pleasure Visitors - Summer 1993



Lodging Type of Vacation/Pleasure Visitors

Unlike All Visitors, the most common lodging type used by Vacation/Pleasure visitors were cruise ships (51%). Hotel/motels were the second most widely used type of accommodation (45%) followed by resort/lodges utilized by one-quarter of VPs. RV/campgrounds were used by 18% of VPs, a slight decrease from 1989. Private homes were the next most widely used lodging type. Bed and breakfasts gained in popularity among VPs between 1989 and 1993, increasing from 7% to 9% in the four year period. Ferry usage diminished to 9%.

Other types of lodging such as camping in State or U.S. Forest Service cabins increased in popularity. This is probably related to the growth in ecotourism and adventure packages, which emphasize Alaska in a natural setting.

Several lodging types posted a decrease in the number of nights used by VPs since 1989, reflecting the trend toward shorter more frequent vacations. The number of hotel/motel nights diminished from 4.1 in 1989 to 3.8 in 1993. Resort/lodges and private home stays decreased one night. Ferry use stayed the same and cruise ship use declined slightly.

On the other hand, RV/campground use increased a full night. VP bed and breakfast use also increased.

Table III-H

**Lodging Type
Vacation/Pleasure Visitors - Summer 1993**

	Average Number of Nights by V/P Visitors	Percent of V/P Visitors Using This Lodging	Average Number of Nights V/Ps Use This Lodging
Hotel/Motel	1.7	45%	3.8
Resort/Lodge	0.5	24	2.1
Bed & Breakfast	0.3	9	3.4
Private Home	1.1	13	8.2
RV/Campground	2.3	18	12.7
Cruise Ship	2.3	51	4.5
Ferry	0.2	9	2.3
Wilderness	0.7	8	8.3
Other	0.2	3	6.2

Regions Visited by Vacation/Pleasure Visitors

Vacation/Pleasure travel patterns differed from All Visitors with travel itineraries concentrating on Alaska's major visitor attractions. Southeast attracted nearly three-quarters of the market. The Inside Passage and Glacier Bay were major draws to this region. Cruising, an enticing form of travel, includes these attractions on many itineraries. The bulk of cruising was round-trip which is concentrated in Southeast.

Southcentral captured the next largest group, hosting nearly two-thirds of Alaska's VPs. Southcentral visitors typically used Domestic Air and/or were booked on a cruise tour package.

Denali/McKinley gained in popularity between 1989 and 1993 increasing its share from 40% to 43%. This region continues to attract more visitors each year, both Independent and Package. Nearly half traveled as Package visitors while one-third traveled independently. One-quarter of VPs to Denali traveled as Inde-Package visitors.

The Interior/North region attracted a healthy 40% of VPs. More than one-half traveled to the Interior as Independent or Inde-Package visitors. Among VPs to the Interior, 45% traveled as Package visitors.

Southwest lost some of its market share since 1989, attracting 4% of all VPs to Alaska in Summer 1993. Unlike Alaska's other regions, Southwest attracted mostly Independent visitors. This region caters to a highly specialized market attracting hunters and sport fishers.

Table III-I

Regions Visited Vacation/Pleasure Visitors - Summer 1993

Region	Number of V/P Visitors	Percent of V/P Visitors
Southeast	463,100	73%
Southcentral	411,000	65
Denali/McKinley	269,600	43
Interior/North	243,900	39
Southwest	25,600	4
Total	631,000	100%

Communities and Places Visited by Vacation/Pleasure Visitors

Anchorage hosted the largest quantity of Vacation/Pleasure visitors to Alaska, visited by 387,000. Juneau was a close second with 383,000 visitors and virtually an equal share (61%) of the VP market. Ketchikan, as the third most popular location, was visited by nearly six of ten VPs, up slightly from 1989. Southeast attracted larger numbers of visitors to other destinations including Skagway (49%), Glacier Bay (41%) and Sitka (35%), all in the top ten. In fact, five of the top ten most visited places by VPs were located in Southeast. Cruising contributed greatly to these high visitation numbers.

Denali/McKinley replaced Glacier Bay taking fifth position between 1989 and 1993. Fairbanks attracted over 220,000 visitors in 1993, followed by Sitka, Seward and Tok. Kenai attracted 20% of all VPs. Fishing, a major attraction on the Kenai peninsula, continues to draw many visitors to the area.

Palmer, Haines, Valdez, Prince William Sound, Homer and Wasilla each attracted the same share of VPs. Whittier's market share dropped considerably from 1989, largely due to the loss of cruise traffic to that port. Seward gained the cruise traffic Whittier lost, resulting in an 8% increase in its market share.

Nome and Kotzebue increased their market share slightly and Barrow stayed the same at 1%. Other small communities located in Southwest such as Kodiak, Iliamna, Dillingham and Bethel, maintained their market shares.

In Southeast, Juneau was the most visited community attracting more than eight of ten visitors. Ketchikan hosted the second largest group (79%) nearly equaling Juneau. Anchorage was unsurpassed in Southcentral hosting 94% of the region's market. Seward maintained its second place ranking with a total of 208,000 visitors or 33% of all VPs, an increase from 1989.

Fairbanks and Tok continued their domination in the Interior/North. Both communities experienced increases in market share. These two communities were heavily affected by both the Independent (Highway visitors) and Package markets (cruise/tour).

Southwest communities drew a select, specialized market and experienced slight shifts in market share. King Salmon was still the most visited community, however Iliamna moved to second place within the region, while Kodiak experienced a slight decrease in market share. The Aleutian and Pribilof Islands, not included on the community table in 1989 attracted enough visitors to give them an 18% and 13% market share respectively among Southwest visitors.

Denali/McKinley drew a healthy portion of Alaska visitors (43%) to the region, increasing its market share 3%.

Table III-J

Communities and Places Visited Vacation/Pleasure Visitors - Summer 1993

	Total Number of V/P Visitors	Percent of Total V/P Visitors to Community or Place
Total V/P Visitors	631,000	100 %
Anchorage	387,100	61 %
Juneau	383,400	61
Ketchikan	366,100	58
Skagway	311,300	49
Denali/McKinley	269,600	43
Glacier Bay	256,400	41
Fairbanks	220,600	35
Sitka	219,600	35
Seward	208,300	33
Tok	133,900	21
Kenai	126,100	20
Palmer	110,300	17
Valdez	109,700	17
Haines	109,500	17
Prince William Sound	108,000	17
Homer	107,600	17
Wasilla	104,100	17
Soldotna	101,600	16
Glennallen	89,800	14
Whittier	75,700	12
Other Kenai Peninsula Communities	58,200	9
Wrangell	53,500	8
Petersburg	34,700	5
Southcentral Wilderness Areas	29,600	5
Nome	19,300	3
Kotzebue	17,700	3
Southeast Wilderness Areas	17,300	3
Cordova	14,800	2
Interior/North Wilderness Areas	10,700	2
Prudhoe Bay	9,700	2
King Salmon	7,800	1
Iliamna	5,900	1
Aleutian Islands	4,600	1
Kodiak	4,100	1
Katmai	3,900	1
Barrow	3,400	1
Pribilofs	3,300	1
Dillingham	3,200	1
Southwest Wilderness Areas	2,400	<1
Bethel	1,400	<1
Other Southcentral Communities	39,500	6
Other Interior/North Communities	26,800	4
Other Southeast Communities	19,600	3
Other Southwest Communities	4,400	1
Unknown	900	<1

Table III-K

**Communities and Places Visited
By Region
Vacation/Pleasure Visitors - Summer 1993**

	Number of V/P Visitors	% of All V/P Visitors to AK	% of All V/P Visitors to Region
Southeast	463,100	73 %	100 %
Juneau	383,400	61	83
Ketchikan	366,100	58	79
Skagway	311,300	49	67
Glacier Bay	256,400	41	55
Sitka	219,600	35	47
Haines	109,500	17	24
Wrangell	53,500	8	12
Petersburg	34,700	6	7
Wilderness Areas	17,300	3	4
Other Southeast Communities	19,600	3	4
Southcentral	411,000	65 %	100 %
Anchorage	387,100	61	94
Seward	208,300	33	51
Kenai	126,100	20	31
Palmer	110,300	18	27
Valdez	109,700	17	27
Prince William Sound	108,000	17	26
Homer	107,600	17	26
Wasilla	104,100	17	25
Soldotna	101,600	16	25
Glennallen	89,800	14	22
Whittier	75,700	12	18
Other Kenai Peninsula Communities	58,200	9	14
Wilderness Areas	29,600	5	7
Cordova	14,800	2	4
Other Southcentral Communities	39,500	6	10
Interior/North	243,900	39 %	100 %
Fairbanks	220,600	35	90
Tok	133,900	21	55
Nome	19,300	3	8
Kotzebue	17,700	3	7
Wilderness Areas	10,700	2	4
Prudhoe Bay	9,700	2	4
Barrow	3,400	1	1
Other Interior/North Communities	26,800	4	11
Southwest	25,600	4	100 %
King Salmon	7,800	1	30
Iliamna	5,900	1	23
Aleutian Islands	4,600	1	18
Kodiak	4,100	1	16
Katmai	3,900	1	15
Pribilofs	3,300	1	13
Dillingham	3,200	1	13
Wilderness Areas	2,400	<1	9
Bethel	1,400	<1	5
Other Southwest Communities	4,400	1	17
Denali/McKinley	269,600	43 %	100 %
Unknown	900	<1	
Total	630,900	100 %	

Attractions Visited by Vacation/Pleasure Visitors

The Inside Passage remained Alaska's top visited attraction, experienced by 370,500 VPs. Ketchikan Totems grew in popularity between 1989 and 1993 shifting from fifth place to the second most visited attraction in the state. The Mendenhall Glacier dropped to third place, visited by 310,000 VPs. High visitation numbers to Southeast attractions can be attributed to the strong growth in the cruise market. Other Southeast attractions in the top ten list of most visited attractions were Skagway's Historic Gold Rush District, Glacier Bay and Sitka's Russian Church and Dancers.

Denali/McKinley was the fifth most visited attraction in the state, up from 1989. Portage Glacier and the Transalaska Pipeline were the sixth and ninth most visited attractions respectively followed, by the Anchorage Museum of History and Art in tenth place.

Other top twenty attractions attended by VPs were essentially the same as in previous survey years. The University of Alaska - Fairbanks was visited by 158,000 VPs. Sitka National Historical Park attracted 153,000 visitors, making it the twelfth most visited attraction. Many VPs traveled the Alaska Highway, perhaps affected by the marketing efforts generated the previous year for the 50th anniversary of its construction.

Prince William Sound, Alaska State Museum, Columbia Glacier, the Kenai River, Chena River Trips, Resurrection Bay, and the Valdez Pipeline Terminal rounded out the top twenty most visited attractions in the state.

Table III-L

**Attractions Visited Statewide
Vacation/Pleasure Visitors - Summer 1993**

Attraction	Number of V/P Visitors To Attraction	% of V/P Visitors To Attraction
Total V/P Visitors	631,000	100 %
Inside Passage	370,500	59
Ketchikan Totems	314,900	50
Mendenhall Glacier	310,300	49
Skagway's Historic Gold Rush District	282,500	45
Denali/McKinley	269,900	43
Portage Glacier	263,000	42
Glacier Bay	245,500	39
Sitka's Russian Church & Dancers	180,600	29
Transalaska Pipeline	173,200	27
Anchorage Museum of History & Art	168,500	27
University of Alaska - Fairbanks	158,500	25
University of Alaska Museum	143,900	23
Large Animal Research Station	36,600	6
Agriculture & Forestry (Experimental Farm Station)	14,600	2
Geophysical Institute	7,300	1
Sitka National Historical Park	152,800	24
Alaska Highway	141,500	22
Prince William Sound	139,700	22
Alaska State Museum	134,300	21
Columbia Glacier	119,200	19
Kenai River	119,200	19
Chena River Trips	97,600	15
Resurrection Bay	94,500	15
Valdez Pipeline Terminal	94,500	15
Alaskaland	85,400	14
College Fjord	90,400	14
Chugach State Park	90,400	14
Gold Panning, Dredges & Saloons	80,500	13
Alyeska Ski Resort	74,000	12
Kenai National Wildlife Refuge	69,900	11
Lake Hood Air Harbor	61,700	10
St. Nicholas Russian Orthodox Church and Native Spirit Houses	61,700	10
Misty Fjords National Monument	55,600	9

Table III-L Continued

**Attractions Visited Statewide
Vacation/Pleasure Visitors - Summer 1993**

Attraction	Number of V/P Visitors To Attraction	% of V/P Visitors To Attraction
Kenai Fjords National Monument	53,400	8
Matanuska Glacier	49,300	8
Musk Ox Farm	41,100	7
Chilkat Bald Eagle Preserve	46,300	7
Tetlin National Wildlife Refuge	39,000	6
Kachemak Bay	37,000	6
Potter Point State Game Refuge	32,900	5
Transalaska Pipeline Haul Road	31,700	5
Hot Springs	29,300	5
Iditarod Museum	28,800	5
Crow Creek Mine	28,800	5
Tracy Arm Fjords	27,800	4
Chilkat Dancers	27,800	4
Hatcher Pass Recreation Area	24,700	4
Nome - Gold Rush History	19,500	3
Kotzebue-Eskimo Culture	17,000	3
Brooks Range	14,600	2
Knik Glacier	12,300	2
Independence Mine State Historic Park	12,300	2
Alaska State Fair	12,300	2
Prudhoe Bay Oil Fields	12,200	2
Aleutian Islands	9,000	1
Katmai National Park	8,700	1
Alaska Historical and Transportation Museum	8,200	1
Gates of the Arctic National Park	7,300	1
Russian Orthodox Church	6,400	1
Arctic National Wildlife Refuge	4,900	1
Eaglecrest Ski Area	4,600	1
Kodiak National Wildlife Refuge	4,600	1
Fort Abercrombie	3,300	<1
Pribilof Islands	3,300	<1
Baranof Museum	3,000	<1
Barrow - Northernmost Point in North America	2,400	<1

Table III-M

Attractions Visited By Region Vacation/Pleasure Visitors - Summer 1993

	Number of V/P Visitors To Region/Attraction	Percent of V/P Visitors To Alaska	Percent of V/P Visitors To Region
Total V/P Visitors	631,000	100 %	
Southeast	463,100	73 %	100 %
Inside Passage	370,500	58	80
Ketchikan Totems	314,900	50	68
Mendenhall Glacier	310,300	49	67
Skagway's Historic Gold Rush District	282,500	45	61
Glacier Bay	245,400	39	53
Sitka's Russian Church & Dancers	180,600	29	39
Sitka National Historical Park	152,800	24	33
Alaska State Museum	134,300	21	29
Misty Fjords National Monument	55,600	9	12
Chilkat Bald Eagle Preserve	46,300	7	10
Tracy Arm Fjords	27,800	4	6
Chilkat Dancers	27,800	4	6
Eaglecrest Ski Area	4,600	1	1
Southcentral	411,000	65 %	100 %
Anchorage Area	353,500	56 %	86 %
Portage Glacier	263,000	42	64
Anchorage Museum of History & Art	168,500	27	41
Chugach State Park	90,400	14	22
Alyeska Ski Resort	74,000	12	18
Lake Hood Air Harbor	61,700	10	15
St. Nicholas Russian Orthodox Church and Native Spirit Houses	61,700	10	15
Potter Point State Game Refuge	32,900	5	8
Crow Creek Mine	28,800	5	7
Prince William Sound Area	205,500	33 %	50 %
Prince William Sound	139,700	22	34
Columbia Glacier	119,200	19	29
Valdez Pipeline Terminal	94,500	15	23
College Fjord	90,400	14	22
Kenai Peninsula	185,000	29 %	45 %
Kenai River	119,200	19	29
Resurrection Bay	94,500	15	23
Kenai National Wildlife Refuge	69,900	11	17
Kenai Fjords National Monument	53,400	9	13
Kachemak Bay	37,000	6	9
Matanuska-Susitna Area	90,400	14 %	22 %
Matanuska Glacier	49,300	8	12
Musk Ox Farm	41,100	7	10
Iditarod Museum	28,800	5	7
Hatcher Pass Recreation Area	24,700	4	6
Knik Glacier	12,300	2	3
Independence Mine State Historic Park	12,300	2	3
Alaska State Fair	12,300	2	3
Alaska Historical and Transportation Museum	8,200	1	2

Table III-M Continued

Attractions Visited By Region Vacation/Pleasure Visitors - Summer 1993

	Number of V/P Visitors To Region/Attraction	Percent of V/P Visitors To Alaska	Percent of V/P Visitors To Region
Interior/North	243,900	39 %	100 %
Fairbanks Area	222,000	35 %	91 %
Transalaska Pipeline	173,200	27	71
University of Alaska - Fairbanks	158,500	25	65
University of Alaska Museum	143,900	23	59
Large Animal Research Station	36,600	6	15
Agriculture & Forestry (Experimental Station Farm)	14,600	2	6
Geophysical Institute	7,300	1	3
Chena River Trips	97,600	15	40
Alaskaland	85,400	14	35
Gold Panning, Dredges & Saloons	80,500	13	33
Hot Springs	29,300	5	12
Other Interior Areas	146,300	23 %	60 %
Alaska Highway	141,500	22	58
Tetlin National Wildlife Refuge	39,000	6	16
Other Northern Areas	56,100	9 %	23 %
Transalaska Pipeline Haul Road	31,700	5	13
Nome - Gold Rush History	19,500	3	8
Kotzebue-Eskimo Culture	17,100	3	7
Brooks Range	14,600	2	6
Prudhoe Bay Oil Fields	12,200	2	5
Gates of the Arctic National Park	7,300	1	3
Arctic National Wildlife Refuge	4,900	1	2
Barrow - Northernmost Point in North America	2,400	<1	1
Southwest	25,600	4 %	100 %
Aleutian Islands	9,000	1	35
Katmai National Park	8,700	1	34
Russian Orthodox Church	6,400	1	25
Kodiak National Wildlife Refuge	4,600	1	18
Fort Abercrombie	3,300	1	13
Pribilof Islands	3,300	1	13
Baranof Museum	3,000	<1	12
Denali/McKinley	269,600	43 %	100 %

Vacation/Pleasure Visitor Trip Planning

Alaska Trip Planning Timelines

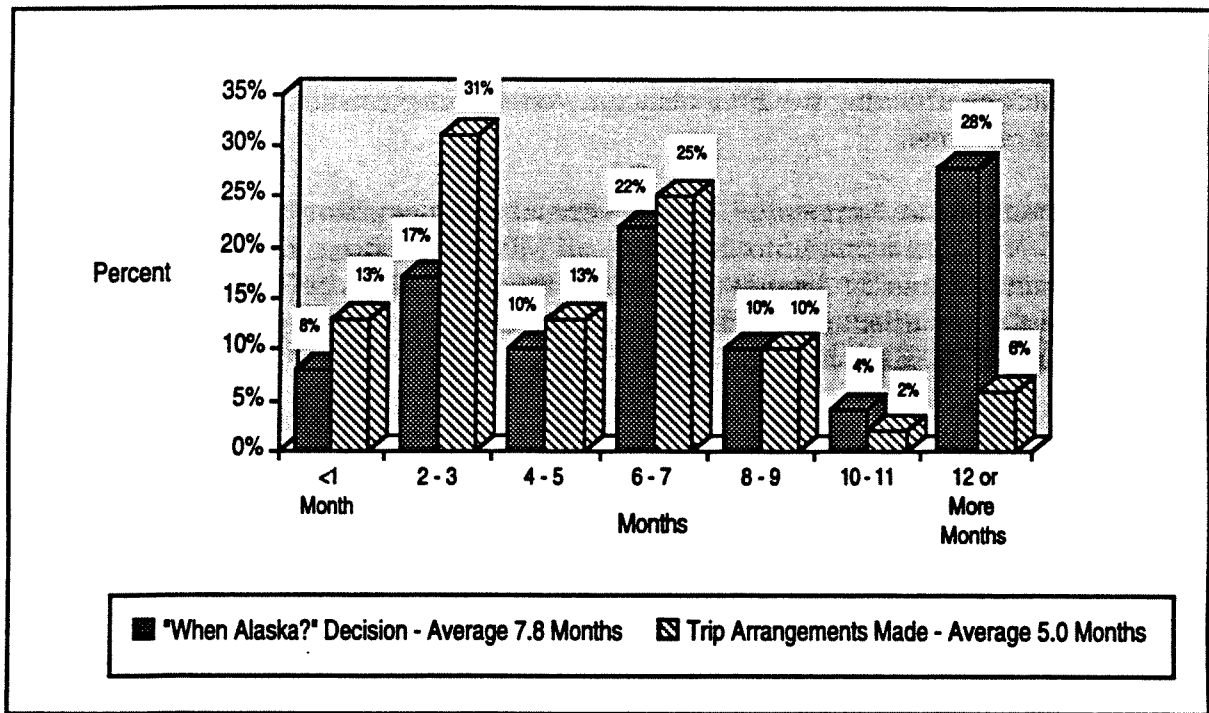
VPs decided to visit Alaska eight months on average prior to taking their trip, one month later than in 1989. Trip arrangements were made five months in advance on average, the same as in 1989. Most VPs (28%) made their decision to come to Alaska a year or more in advance. Another 22% decided within half a year of their trip.

One-quarter of the VP market decided to visit Alaska between one and three months in advance. Ferry, Highway, and Inde-Package visitors required considerable lead time to plan their trip (10 months), while Package visitors needed less time (7.5 months). Visitors from Washington (6.5 months), Canada (6.6 months), and Japan (5.9 months) were the earliest decision makers.

Travel arrangements occurred much closer to departure dates. More than four of ten VPs made their trip arrangements between one and three months in advance of their trip. Another 38% made trip arrangements between five and seven months ahead. Only 6% needed a year or more to make trip arrangements.

International Air and Highway VPs used the least amount of time to make their Alaska trip arrangements, between four and five months. VP Cruise and Ferry users devoted more time to travel arrangements, averaging six months in advance of departure. Overseas visitors (4.8 months) made their travel arrangements closer to their departure date than domestic VPs (5.2 months). Surprisingly, Japanese (2.7 months) and Australians/New Zealanders (3.9 months) used the least amount of time to finalize travel arrangements.

Alaska Trip Planning Timelines Vacation/Pleasure Visitors - Summer 1993



Alaska Trip Decision Criteria for Vacation/Pleasure Visitors

Vacation/Pleasure visitors cited a number of reasons for visiting Alaska in 1993. The most prominent category was personal reasons stated by 54% of VP visitors. The opportunity to travel with friends and family influenced 10% of VPs. Visiting Alaska was a long time desire for 9% and 7% visited Alaska in 1993 for a special occasion. Other factors affecting the 1993 decision were timing considerations, stage in life and financial reasons.

The attractions and appeal of Alaska were also a major draw for 16% of VPs visiting in 1993. Natural attractions drew 9% of VPs and fishing drew an additional 6%. Recommendations by friends influenced 8% of Alaska's 1993 visitors. The desire to see loved ones affected the decision-making of 7%. Price/discount considerations encouraged 5% to travel to Alaska in 1993.

Choosing Alaska Over Other Destinations

Visitors were asked to indicate what other destinations they were considering as vacation spots for Summer 1993. The majority of VPs (71%) had already decided on Alaska. Personal reasons topped the list of reasons for visiting Alaska rather than the other destinations considered. Once again the ability to travel with family or friends this year was a key factor in bringing many VPs to Alaska.

Other personal reasons cited were that 7% of VPs had never been to Alaska and 5% indicated that timing considerations influenced their choice to visit Alaska rather than another vacation location.

Alaska's attractions and its natural appeal were key factors for drawing 17% of VPs from competing vacation destinations. Another 8% were influenced by price or discount considerations.

Table III-N

**1993 Alaska Trip Decision Criteria
Vacation/Pleasure Visitors - Summer 1993**

	Main Reason for 1993 Alaska Trip	Reason for Alaska vs. Other Destinations Considered*
1. Personal Reasons	54%	42%
Family/Friend Related Reasons	10	11
Long Time Desire	9	3
Special Occasion	7	1
Timing Considerations	6	5
Stage in Life	4	2
Financial	3	1
Never Been There	3	7
Group Travel Opportunity	2	2
Wanted to Cruise	2	<1
Other	8	9
2. Attractions/Appeal of Alaska	16	17
Natural Attractions	9	9
Fishing	6	6
Adventure Travel	1	2
Other	<1	-
3. Recommended by Others	8	3
4. Visit Friends and Relatives	7	3
5. Price/Discount Considerations	5	8
6. Advertising/Promotion	3	<1
7. Business	1	1
8. Visit All 50 States	<1	-
9. Weather	<1	3
9. Other	5	23

*Of those who chose Alaska vs. other destinations considered.

Competing with Specific Destinations

Alaska's main competitor for Vacation/Pleasure visitors was Europe. This was true in 1989 as well. Canada was also a primary rival along with Hawaii and Mexico. In fact, the list of Alaska's competition has remained essentially the same with only a few minor changes in the order. Hawaii replaced Mexico in third place between 1989 and 1993. California jumped up a spot to sixth place pushing the Caribbean to seventh. The Pacific Northwest also rose to a more competitive position shifting to ninth place.

Personal reasons was the answer most commonly cited response for selecting Alaska over its top ten rival destinations. Alaska's attractions/appeals was also a commonly cited motive for choosing Alaska over nine of Alaska's top ten competitors.

Price or discount considerations prompted VPs to select Alaska over eight of Alaska's top ten destination competitors. In the past, cost was a major factor in deterring visitors to Alaska. The perception was that it was costly to travel to and within the state. Competitive packaging and discounting have made Alaska a more financially accessible destination.

Recommendations by others and the incentive of visiting friends and relatives were other common motives for choosing Alaska over other travel destinations.

Table III-O

**Why Visitors Chose Alaska Over a Considered Destination
Vacation/Pleasure Visitors - Summer 1993**

Considered Destination	Reason for Choosing Alaska
1. Europe	Personal Reasons, Attractions/Appeal of Alaska, Price/Discount Considerations, Recommended by Others, Visit Friends and Relatives
2. Canada	Personal Reasons, Attractions/Appeal of Alaska, Recommended by Others, Price/Discount Considerations, Business, Visit Friends and Relatives
3. Hawaii	Personal Reasons, Attractions/Appeal of Alaska, Visit Friends and Relatives, Price/Discount Considerations, Recommended by Others, Business, Weather
4. Mexico	Attractions/Appeal of Alaska, Recommended by Others, Price/Discount Considerations, Personal Reasons, Visit Friends and Relatives
5. Australia/New Zealand	Attractions/Appeal of Alaska, Price/Discount Considerations, Personal Reasons, Visit Friends and Relatives
6. California	Personal Reasons, Attractions/Appeal of Alaska, Price/Discount Considerations, Weather, Visit Friends and Relatives
7. Caribbean	Personal Reasons, Weather, Attractions/Appeal of Alaska
8. New England	Personal Reasons, Price/Discount Considerations
9. Pacific Northwest	Attractions/Appeal of Alaska, Personal Reasons, Weather, Price/Discount Considerations, Recommended by Others, Visit Friends and Relatives
10. China/Hong Kong/Taiwan	Personal Reasons, Attractions/Appeal of Alaska
11. South Atlantic States	Personal Reasons, Attractions/Appeal of Alaska, Weather, Recommended by Others
12. Midwest States	Attractions/Appeal of Alaska, Price/Discount Considerations, Recommended by Others

Travel History and Future Preferences of Vacation/Pleasure Visitors

Vacation/Pleasure visitors were asked to provide historical and future travel plan information. Europe continued to be one of Alaska's top competitors with nearly one-third of VPs indicating they had traveled there in the past five years. Nearly two of ten went to Europe on their last vacation 2,000 miles or more from home. Europe was offered as the preferred next destination for 20% of VPs and the probable vacation destination for 16%. Great Britain and Ireland appear to have the greatest drawing power among European countries.

Other destinations popular among VPs in the past five years were Canada, the Caribbean, California, Hawaii, and Mexico. More of Alaska's visitors had traveled previously to the Caribbean (prior to cruising Alaska) in 1993 (23%) than in 1989 (13%). The Caribbean has grown in popularity among cruise destinations. On the other hand, Hawaii lost some ground as a travel destination. Smaller proportions of Alaska VPs traveled to Hawaii within the last five years (19%) than in 1989 (24%).

Alaska VPs appear to be more well-traveled than ever. A higher proportion of visitors traveled domestically to the Pacific Coast states, Mountain States, and Southern States. Larger proportions also traveled abroad to Mexico, and Australia/New Zealand.

VPs were asked to indicate where they preferred to go on their next vacation as well as where they would most likely go. As mentioned above, Europe was the preferred destination for the next vacation. The next most popular response by 18% of VPs was Alaska. Alaska was also designated the next probable vacation destination by 11% of VPs. These responses indicate that VPs had a positive Alaska experience and either wish to replicate it or perhaps see other portions of the state they did not have the opportunity to visit in 1993.

Australia/New Zealand was the preferred next vacation choice for 11% of VPs. Only 4% indicated they would follow through and actually travel there. VPs desiring to go to Canada are more likely to travel there on their next vacation. Florida, the preferred next vacation destination of 2% of VPs, will more than likely be the next vacation destination for 7%.

Table III-P

Travel History and Future Preference of Alaska Visitors Vacation/Pleasure Visitors - Summer 1993

	Last Vacation 2,000 + Miles	Past Five Years	Others Considered for 1993	Preferred Next Vacation	Probable Next Vacation
Europe	17 %	32 %	7 %	20 %	16 %
Great Britain & Ireland	5	13	1	5	5
France	1	8	<1	<1	1
Germany	1	4	<1	1	1
Pacific Coast States	19	55	6	7	12
Hawaii	9	19	4	6	5
California	7	22	<1	—	4
Washington/Oregon	3	14	2	1	3
Caribbean	12	23	1	6	7
Southern U.S. States	8	53	1	4	12
Florida	3	22	1	2	7
Canada	10	24	4	8	8
British Columbia	2	6	1	1	1
Maritimes	2	3	1	1	1
Alberta	2	5	1	1	1
Mexico	8	18	1	3	4
Mountain States	3	41	<1	4	10
Arizona	2	10	<1	3	2
Nevada	1	7	—	—	1
Colorado	<1	7	<1	1	2
Utah	<1	4	<1	—	—
ALASKA	3	7	—	18	11
Australia/New Zealand	3	10	1	11	4
Eastern U.S. States	3	16	<1	1	2
Midwestern U.S. States	<1	14	<1	<1	<1
China	1	4	<1	1	1
Japan/Korea	<1	3	<1	<1	—
S.E. Asia/India	1	3	<1	1	1
Israel	1	1	<1	1	<1
South Pacific	1	3	<1	1	<1

Trip Information Sources for Vacation/Pleasure Visitors

Vacation/Pleasure visitors utilized a variety of sources to plan and arrange their Alaska trip. Most VPs used travel agents (59%). A more detailed description of travel agent functions is presented in the "Travel Agent Involvement Section".

Government organizations such as the State Division of Tourism and the Alaska Tourism Marketing Council (ATMC) were utilized by nearly one-quarter of VPs. The Division of Tourism and the ATMC received many requests for information and are responsible for distributing the *State of Alaska Official Vacation Planner*. Other government agencies providing additional Alaska travel information including the Alaska Marine Highway System, U.S. Forest Service, chambers of commerce, and convention and visitors bureaus.

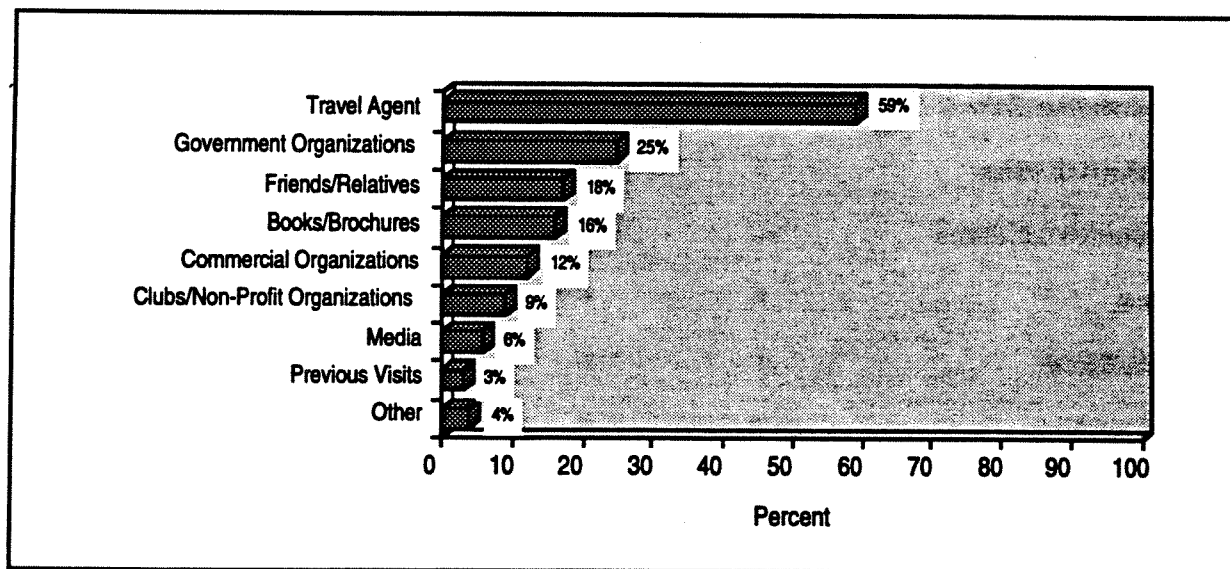
Books/brochures were used as a trip planning resource by 16% of VPs. Books frequently utilized by VPs are the *Milepost*, the *Alaska Almanac* or one of the many available guidebooks.

Friends and relatives were used as a resource by 18%. Commercial organizations such as the American Automobile Association, cruise and tour companies and airlines were contacted by 12% of VPs.

Clubs and non-profit organizations such as American Association of Retired Persons (AARP), RV or motorcycle clubs were used as information sources by 9% of Summer 1993 VPs.

Graph III-G

**Trip Information Sources
Vacation/Pleasure Visitors - Summer 1993**



Requesting the State of Alaska Official Vacation Planner

One-quarter of all VPs used the State of Alaska *Official State Vacation Planner* as a trip information resource. Most of these visitors arrived by Highway or the State ferry system. Cruise visitors were the least inclined to use this tool. VPs who traveled to the Interior and Denali requested the *Vacation Planner* more than visitors to other regions.

Among transportation mode users, Domestic VPs were most inclined to make use of the *Vacation Planner*. About one-third of Midwesterners and Southerners indicated they ordered the brochure from the Division of Tourism.

Receipt of Unsolicited Brochures on Alaska

Unsolicited brochures were received by nearly two of ten VPs. VPs averaged seven unsolicited brochures and nearly one-third received six or more brochures. Highway (8.1) and State ferry visitors (6.7) averaged the greatest number of brochures. Visitors from the Western United States received the largest number of unsolicited brochures (6.5) on average.

Readership of Special Newspaper Travel Sections on Alaska

Special newspaper travel sections were a popular information source for Alaska's Vacation/Pleasure visitors. More than six of ten indicated they had read a special travel section on Alaska. Among mode users, Cruise and Ferry (67% and 68% respectively) travelers were more likely to have read a special newspaper section. International Air visitors were less likely to read about Alaska in a newspaper.

More than three-quarters of the Australia/New Zealander VP market read a newspaper section. This is a key fact for marketers wishing to reach visitors from these two countries. Public relations efforts directed towards the print media could have a positive affect on future visitors from these countries. Visitors from Florida, Ontario, Germany/Switzerland/Austria and Great Britain made heavy use of newspaper sections as well.

Frequent Flyer Program Use

Vacation/Pleasure visitors entering and/or exiting Alaska by air were asked if they or a traveling companion used frequent flyer mileage to travel to Alaska. Among VPs, more than one-quarter of the visitor parties had someone using a frequent flyer award. Frequent flyer programs were used primarily by domestic VPs and visitors from Florida and Texas. Few overseas visitors made use of any sort of mileage program with the exception of Australia/New Zealand visitors with three of ten users.

Travel Agent Involvement in Vacation/Pleasure Visitors Trip Planning

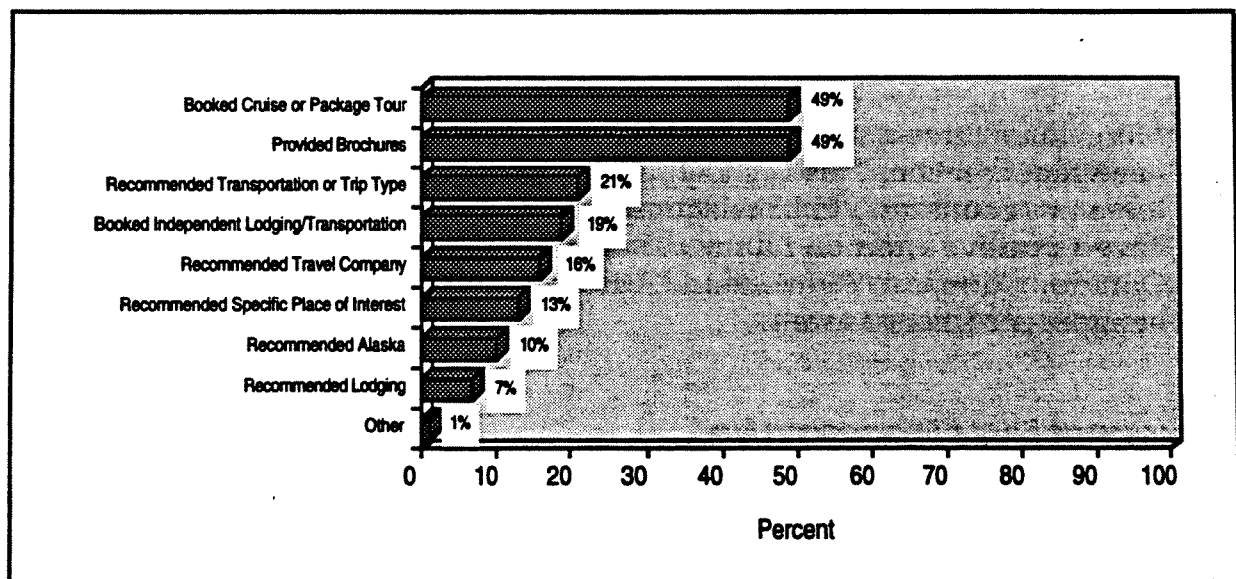
Travel agents provided a variety of services to Alaska's VPs. Travel agents booked a cruise or package tour for one-half of all VPs. Also, one-half of VPs were furnished with brochures. Travel agents were instrumental in suggesting transportation options or a particular type of trip as well as booking independent lodging or transportation. Sixteen percent of VPs received recommendations to deal with a specific tour company.

It is not surprising that 90% of Cruise mode users' tours were booked by a travel agent. Nearly half of Domestic Air users received booking assistance from a travel agent, more than likely getting help with an air/cruise or air/land tour package.

Among overseas VPs, British travelers were more likely to get travel agent assistance with nearly six in ten getting their tour booked for them. This was true for Australia/New Zealand visitors as well. Overseas visitors also used travel agents as a resource for brochures. Once again British VPs were more prone to receive brochures from an agent. Japanese visitors (64%) also made use of this service. On the domestic side, more Florida and Eastern VPs utilized travel agents to book a cruise or tour package for them.

Graph III-H

**Travel Agent Involvement
Vacation/Pleasure Visitors - Summer 1993**



Vacation/Pleasure Trip Arrangements

Vacation/Pleasure visitors differed from All Visitors to the state. Unlike All Visitors more than one-half of VPs purchased their entire trip package prior to arriving in Alaska. More than one-quarter did not buy any type of a package trip or instate tour once they arrived in the state. Some VPs (12%) waited until they arrived in Alaska to purchase some of their instate sightseeing packages. Only 10% bought a portion of their Alaska trip prior to coming to Alaska, while the remaining portion of their trip was planned independently.

It is not surprising that the bulk of Cruise VPs purchased their package in advance (94%). Most of these VPs visited the Southeast region (68%), where round-trip cruising was the most commonly used form of travel.

Most Highway (65%) and Independent (63%) visitors traveled throughout Alaska without purchasing any sort of package or instate tour. Another one-third of Highway visitors, however, bought an instate tour once in Alaska.

Among Overseas visitors more than one-half of German/Swiss/Austrians traveled through Alaska without purchasing any instate package or sightseeing tour. Most British visitors (72%) purchased packages prior to coming to Alaska, coinciding with their high usage of travel agent booking services.

Table III-Q

Trip Arrangements Vacation/Pleasure Visitors - Summer 1993

How Did You Make Arrangements For Your Alaska Trip?	Percent of Visitors
1. Bought a packaged trip in advance for the entire Alaska trip	52%
2. Did not buy a packaged trip or instate tour while in Alaska	27
3. Did not buy a packaged trip in advance for the Alaska trip, but bought tours instate	12
4. Bought a packaged trip in advance for some of the Alaska trip	10

Demographics of Vacation/Pleasure Visitors

Education

Alaska's Vacation/Pleasure visitors were well educated with more than one-half completing a college degree. Nearly three of ten attended or completed graduate school. VPs in 1993 were slightly more educated than their counterparts in 1989. VPs graduating from college increased three points as did the portion attending or completing graduate school.

Among domestic VPs, Texans and visitors from the East were the most highly educated with the majority attending or completing graduate school. Overseas visitors differed with about one-third graduating from high school and another third attending or completing graduate school. Two-thirds of Japanese VPs graduated from college. Australian/New Zealand VPs were the least educated with more than half attending high school only.

Household Income

Vacation/Pleasure average visitor household income is moderately high (\$59,000), and remained the same between 1989 and 1993. The number of VPs earning between \$50,000 and \$75,000 increased to 25%, a 6% increase over 1989. More than one-quarter of VPs averaged household incomes of \$75,000 or more.

International Air and Cruise visitors were the wealthiest visitors with average earnings of \$72,000 and \$62,000 respectively. Among Overseas visitors the Japanese earned the highest average household income in 1993 (\$81,000).

Age & Gender

The average age of Vacation/Pleasure visitors increased slightly over the past four years from 50 to 52. The predominance of Package visitors among VPs contributed to the high age. The average age of Package visitors was 57 years while the average age of Independent visitors was 44. Visitor age category portions fluctuated between 1989 and 1993. The most dramatic increase was in the 35-44 year old category moving from 1% of the sample to 12%.

Vacation/Pleasure visitors were equally male and female.

Employment

Nearly half of Vacation/Pleasure visitors were employed, higher than in previous years. The proportion of VP retirees also increased slightly from 40% in 1989 to 43%. VP visitors not in the labor force, such as homemakers, students and children were 10% of all VPs to Alaska.

Origin

Most domestic Vacation/Pleasure visitors hailed from the Western United States. Southern states contributed 23% and the Midwest 16%. Eight percent of VPs arrived from Overseas with 3% coming from Germany/Switzerland/Austria.

Table III-R

Demographics **Vacation/Pleasure Visitors - Summer 1993**

	Percent of Visitors
Visitor Education	
Not High School Graduates	5 %
High School Graduates	21
1 - 3 Years College	23
College Graduate	24
Attended or Completed Graduate School	27
Visitor Household Income (Average - \$59,200)	
Under \$25,000	10 %
\$25,000 - \$34,999	16
\$35,000 - \$49,999	22
\$50,000 - \$74,999	25
\$75,000 - \$99,999	15
\$100,000 and Over	12
Visitor Age (Average - 52 Years Old)	
Under 18 Years	5 %
18 - 24 Years	3
25 - 34 Years	9
35 - 44 Years	12
45 - 54 Years	18
55 - 64 Years	23
65 - 74 Years	24
75 + Years	7
Visitor Gender	
Male	50 %
Female	50
Visitor Employment	
Employed	47 %
Retired	43
Other	10
Visitor Origin	
West	31 %
California	13
Washington	6
Midwest	16
South	23
East	13
Canada	9
Overseas	8
Germany/Switzerland/Austria	3
Great Britain	2
Japan	1
Australia/New Zealand	2



Visitors Regional Profile

Visitor Opinions

Visitor Travel Patterns

Visitor Trip Planning by Regional Visitors

Demographics



Vacation/Pleasure Visitors Regional Profile

Introduction

Chapter III provided an overview of the total Vacation/Pleasure market. This chapter provides more detail, describing the VP market by region.

This chapter uses a format similar to that used in Chapter III. Many of the results look similar since VPs comprise the bulk of the summer vacation market. Regional information, however, is another useful way of presenting data to provide a more complete picture of this key market.

Vacation/Pleasure Visitor Opinions by Region

Overall Alaska Trip Ratings

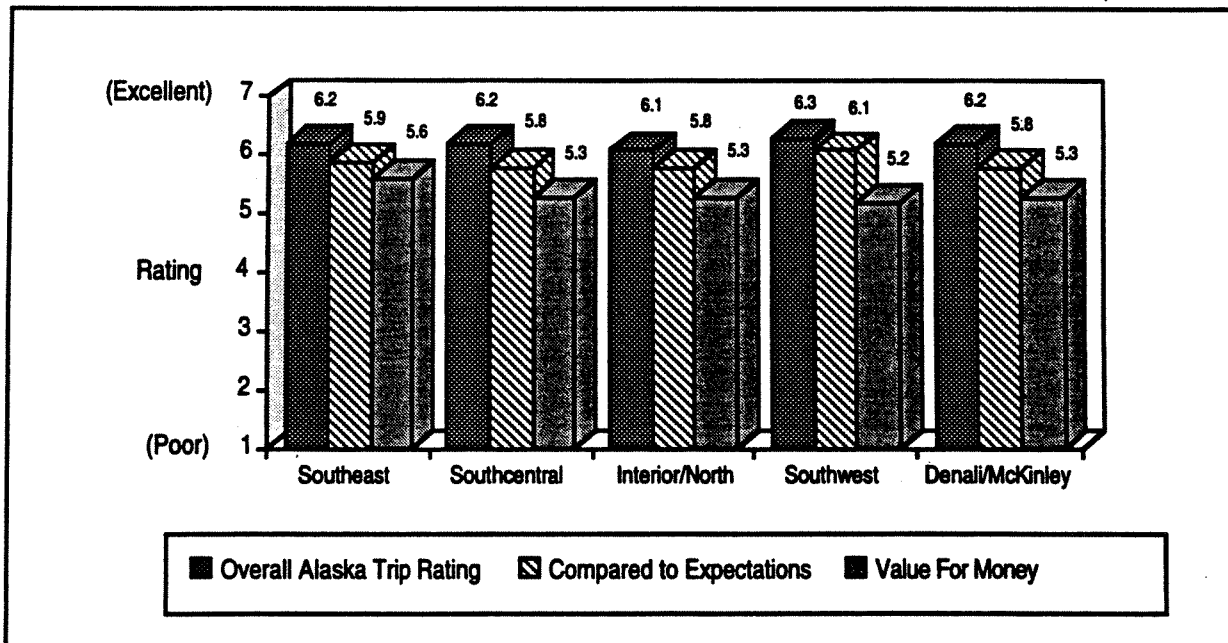
Vacation/Pleasure visitors gave their overall Alaska trip very high ratings in all regions. Ratings ranged between a high of 6.3 in Southwest and a slightly lower rating of 6.1 in the Interior/North (1 = poor and 7 = excellent on a one to seven scale). Nearly half of all VPs to Southeast and Denali gave their overall Alaska trip the highest rating of seven. More than one-third of Southwest visitors rendered a seven rating.

The Alaska Summer 1993 experience was very positive for all VPs with visitors to all regions, indicating that their trip exceeded expectations. Though these expectations ratings were somewhat lower than the overall trip rating, they were well above average. Southwest and Southeast visitors were the most pleased assigning a 6.1 and 5.9 compared to expectations rating.

Value for money ratings for the Alaska trip, though above average, were lower than the overall Alaska trip and compared to expectations ratings. One-quarter of VPs to Southeast assigned value for money ratings of seven as did about twenty percent of VPs to all other regions. About one-third of VPs to all regions, except Southwest, assigned value for money a six. The bulk of Southwest VPs (49%) rated value for the money a five.

Graph IV-A

**Comparison of Alaska Trip Ratings
Vacation/Pleasure Visitors - Summer 1993
(By Region Visited)**



Value for the Money Ratings

As indicated in the previous discussion, value for money ratings for Alaska on the whole were very good, ranking well above average. An analysis of some of Alaska's services provide clues for areas of improvement. VPs to all regions rated Alaska's friendliness/helpfulness very high. Southeast VPs were particularly pleased giving an average rating of 6.3. It is clear that encounters with Alaska residents have been positive and the industry should continue to maintain high ratings in this category.

Sightseeing and attractions were also rated well, particularly among VPs to Southwest (6.1) and Denali/McKinley (5.9). Visitors to Southeast and Southwest attributed fairly high value for money ratings to their trip activities.

The lowest value for money ratings were attributed to Alaska's restaurants by VPs in all regions. This particular service has continually received lower ratings, indicating that VPs perceive a need for improvement in this category. Restaurants in the Interior/North received the lowest ratings. Restaurant ratings by VPs to Southeast were higher, perhaps influenced by the cruise market which tends to rate the Alaska experience higher than other groups.

Table IV-A

**Value for Money Ratings
By Region Visited
Vacation/Pleasure Visitors - Summer 1993
(1 = Poor and 7 = Excellent on 1 to 7 Scale)**

	South-east	South-central	Interior/ North	South-west	Denali/ McKinley
Accommodations	5.4	5.0	5.0	4.9	5.0
Transportation To Alaska	5.5	5.3	5.1	5.4	5.2
Transportation From Alaska	5.5	5.3	5.1	5.5	5.2
Transportation Within Alaska	5.6	5.3	5.2	5.6	5.3
Sightseeing/Attractions	5.8	5.8	5.8	6.1	5.9
Activities	5.6	5.5	5.4	5.7	5.5
Restaurants	5.2	5.0	4.8	4.9	4.9
Friendliness/Helpfulness	6.3	6.2	6.1	6.1	6.2

Regional Satisfaction Ratings

Vacation/Pleasure visitors rated accommodations, services, and activities on a one (poor) to seven (excellent) scale. Accommodations garnered above average ratings, in all regions of Alaska. Southeast VPs assigned the highest ratings to resort/lodge (6.2) and cruise ship (6.2), slightly lower than in 1989. Hotel/motel, RV/campground and Ferry ratings all improved between 1989 and 1993. Southcentral VPs were pleased with cruise and Ferry accommodations. Bed and breakfasts were rated highly (5.6), while resort/lodge received the lowest rating in that region. On the other hand, Interior/North and Southwest VPs were highly pleased with resort/lodges. Denali/McKinley VPs gave stellar ratings to bed and breakfasts and "other" referring to their camping experiences.

Trains (Alaska Railroad and White Pass and Yukon Route) and cruise experiences scored well in the respective regions in which they operate. Denali/McKinley train passengers were particularly satisfied (6.4). VPs to Southeast, Southcentral, Interior/North and Southwest consistently gave motorcoach travel high marks. Denali/McKinley VPs gave a slightly lower rating of 5.2, probably due to the school busses used in Denali Park.

Restaurants/night-life and shopping received above average ratings from VPs in three of Alaska's five regions. Southwest and Denali/McKinley restaurants/night-life and shopping ratings approached the mediocre level and were lower than 1989 ratings.

VPs were satisfied with the assistance they received at visitor information centers across the state ranging between 6.0 and 4.9. The Southcentral visitor center rating improved slightly since 1989. Southwest ratings, though not as high, were still above average.

Flightseeing, one of the most popular of Alaska's sightseeing options, received stellar ratings statewide. Visitors to Southwest (6.7) and Denali/McKinley (6.6) were particularly satisfied with their flightseeing experience. Riverboat cruises scored well in Interior/North, as did day cruises in Southeast, Southcentral and Southwest.

VPs attributed positive ratings to cultural attractions/museums, particularly in the Interior/North (6.0). The cultural attractions/museums rating improved slightly in the Southwest over 1989.

The most highly acclaimed activities by summer VPs were canoeing/kayaking, rafting, hunting, and photography. Canoeing/kayaking ratings improved between 1989 and 1993 in the Interior/North and Denali/McKinley. Hunting ratings also rose dramatically in Southcentral, Interior/North and Denali/McKinley. Photography and Hiking were rated well in all five regions. Bird and wildlife watching posted good ratings, particularly in the Southwest.

Table IV-B

Regional Satisfaction Ratings
Accommodations, Services and Activities
Vacation/Pleasure Visitors - Summer 1993
 (1 = Poor and 7 = Excellent on 1 to 7 Scale)

	South-east	South-central	Interior/North	South-west	Denali/McKinley
Accommodations					
Hotel/Motel	5.2	5.5	5.3	4.3	5.2
Resort/Lodge	6.2	4.9	6.1	6.2	5.8
Bed & Breakfast	6.0	5.6	6.1	5.9	6.0
RV/Campground	5.2	5.3	5.3	5.2	5.2
Cruise Ship	6.2	5.9	—	—	—
Ferry	5.6	5.9	—	6.7	—
Other	5.4	5.4	5.3	3.1	5.9
Transportation					
Motorcoach	5.8	5.8	6.0	6.7	5.2
Train	6.3	6.2	6.3	—	6.4
Air	5.6	5.7	5.7	5.7	5.9
Cruise Ship	6.3	6.3	—	6.0	—
Ferry	5.8	5.6	—	6.3	—
Rental Car	6.0	5.7	5.7	5.9	5.9
Rental RV	5.2	5.7	5.4	—	5.5
Restaurants/Night-life	5.2	5.1	5.0	3.6	4.8
Shopping	5.3	5.1	5.0	3.5	4.7
Visitor Information Centers	5.9	5.8	6.0	4.9	5.9
Sightseeing					
Flightseeing	6.5	6.5	6.4	6.7	6.6
Day Cruises	6.1	6.1	—	6.5	—
Riverboat Cruises	—	—	6.6	—	—
City Tours	5.7	5.7	5.7	6.1	—
Native Cultural Presentation	5.9	5.8	6.3	5.0	—
Shows/Alaska					
Entertainment	5.5	5.6	6.0	6.0	—
Park/Bus Tour	—	—	—	—	5.7
Other Tours	5.9	6.1	6.1	5.9	6.1
Cultural Attractions/Museums	5.7	5.9	6.0	5.6	5.8
Activities					
Canoeing/Kayaking	6.4	5.9	6.6	6.6	4.9
Rafting	5.8	6.2	6.0	7.0	6.3
Hiking	5.9	6.1	5.8	6.6	6.2
Fishing (Overall)	5.8	5.7	5.6	6.5	4.4
Freshwater Fishing	5.6	5.3	5.3	6.5	4.2
Saltwater Fishing	5.9	6.1	6.0	7.0	—
Wildlife Viewing	5.7	5.8	5.3	6.5	5.7
Bird Watching	5.8	5.6	5.7	6.3	5.2
Hunting	5.6	6.5	6.5	7.0	6.9
Dogsledding	5.6	4.0	5.5	1.0	4.6
Camping	5.5	5.6	5.5	5.0	5.3
Casual Walking	5.7	5.8	5.5	5.7	5.7
Photography	6.3	6.2	5.9	6.3	6.0
Northern Lights Viewing	4.8	5.1	4.6	1.0	4.6
Other	6.7	6.0	5.8	6.4	6.7

Likelihood of Visiting Alaska Again for Vacation

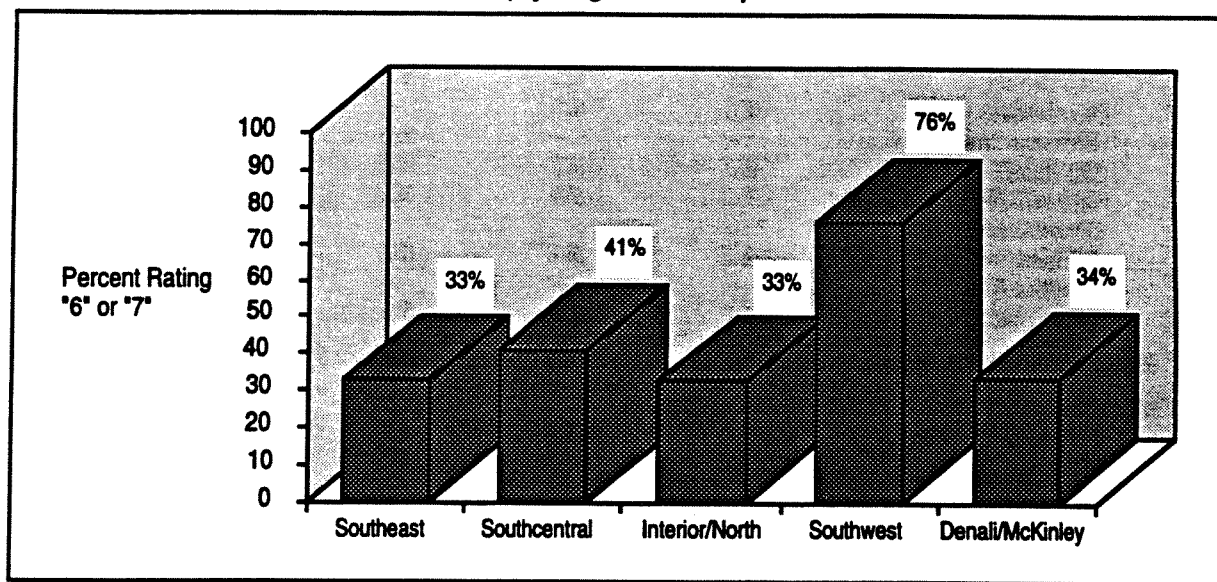
Visitors to the Southwest were the most likely to return to Alaska on another trip with more than three-quarters indicating they would repeat a visit within the next five years. Many Southwest VPs are fishing aficionados and return regularly to the state.

More than four of ten Southcentral VPs indicated a high likelihood of returning to Alaska. About one-third of VPs to Southeast, Interior/North, and Denali/McKinley cited they would more than likely visit Alaska again for a vacation.

Two of ten visitors to Southeast, Southcentral, Interior/North, and Denali/McKinley indicated they would not return within the next five years. Only 1% of Southwest visitors said it was unlikely they would repeat a visit to Alaska.

Graph IV-B

**High Likelihood of Visiting Alaska Again for Vacation
Vacation/Pleasure Visitors - Summer 1993
(By Region Visited)**

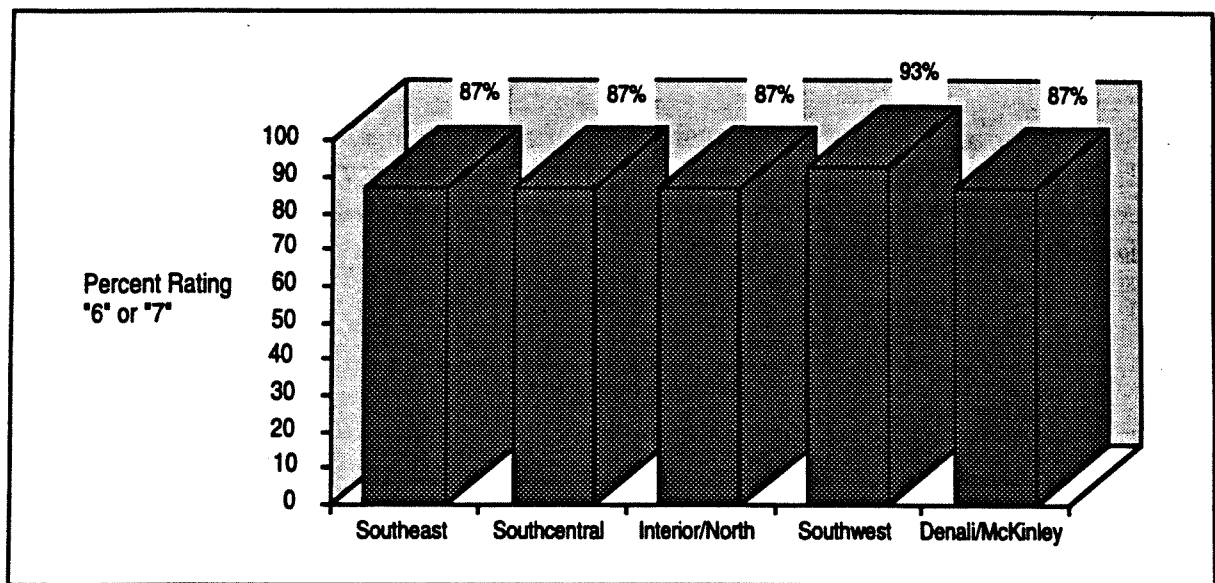


vacation destination. An equal portion of VPs to all other regions indicated they would very likely recommend an Alaska vacation.

This high likelihood of endorsement speaks well of the overall Alaska experience, even considering the more critical value for money evaluations of such amenities as restaurants and accommodations. It is possible that with improvement in these areas that the likelihood of recommendation could increase even more. Word-of-mouth is an effective marketing tool and should not be discounted.

Graph IV-C

**High Likelihood of Recommending Alaska
Vacation/Pleasure Visitors - Summer 1993
(By Region Visited)**



Misconceptions About Alaska

The Alaska experience was better than expected for most VPs, showing significantly higher numbers than in 1989. More than two-thirds of VPs to Southeast, Southcentral, and Denali/McKinley found that their preconceived notions about Alaska were incorrect.

Weather was the key factor to higher numbers of pleased visitors. Nearly half of Southeast visitors found the weather to be a pleasant surprise. Forty percent of Southcentral, Interior/North, and Denali McKinley VPs found summer weather better than anticipated. Summer 1993 was exceptional in terms of weather across the state. Eighteen percent of visitors to Southwest found their Alaska trip was better than had been expected.

Among visitors to Southeast, 13% found Alaska to be worse than they had anticipated. Visitors to Southwest were the least impressed. More than one-third indicated that the appeal of Alaska and its attractions were not up to par.

Interestingly, the appeal of Alaska and its attractions was the largest category among reasons for the Alaska trip being worse than expected for VPs to all regions. One possible explanation for this could be found in the unsolicited comments written on the VOS by respondents. A number of comments referred to disappointment at the lack of wildlife sightings during the Alaska trip.

Southwest also had the greatest portion of visitors who found their trip different than expected (47%). It is possible that Southwest visitors may not have been prepared for the rugged conditions they experienced when spending time in remote fishing lodges or fish camps.

Table IV-C

**Biggest Misconception Cleared Up By Visit to Alaska
By Region Visited
Vacation/Pleasure Visitors - Summer 1993
(Percent of Each Region's Visitors)**

	South- east	South- central	Interior/ North	South- west	Denali/ McKinley
Better Than Expected	68 %	66 %	63 %	18 %	65 %
Weather	48	42	39	—	40
Appeal of Alaska/Attractions	7	6	6	—	5
State Bigger Than Thought	5	7	8	—	8
Roads	3	5	5	—	6
Accommodations/ Transportation Facilities	3	2	3	8	3
Prices/Cost	<1	2	1	—	1
Friendlier	<1	1	<1	3	1
Other	1	2	1	8	2
Different Than Expected	19	14	14	47	14
Worse Than Expected	13	20	23	35	21
Appeal of Alaska/Attractions	10	15	18	33	16
Prices/Cost	1	1	—	3	1
Accommodations/ Transportation Facilities	<1	<1	<1	—	<1
Roads	1	1	2	—	1
Weather	1	<1	<1	—	<1
Other	1	3	3	—	3

What Did You Plan To Do In Alaska That You Did NOT Do?

Visitors were asked what they planned to do on their trip but were unable to do. By far, the most common activity visitors were unable to do was include additional towns or areas on their trip. Nearly half of the visitors to Southwest and one-third of visitors to Southcentral and Denali/McKinley could not include additional stops on their itineraries. More than one-quarter of Interior/North VPs and two of ten Southeast VPs eliminated additional towns and areas from their itineraries.

Southeast VPs also were forced to eliminate additional attractions and day trips from their plans along with fishing trips. These same options were dropped from the schedules of the majority of Southcentral and Denali/McKinley VPs as well. Many VPs to all regions did not see the wildlife they had planned to see.

Fifteen percent of VPs to the Interior/North and Southwest canceled recreational activities from their trip itineraries, as did 10% from Southeast, Southcentral, and Denali/McKinley.

Table IV-D

What Did You Plan To Do In Alaska That You Did NOT Do? Vacation/Pleasure Visitors - Summer 1993 (By Region Visited)

	South- east	South- central	Interior/ North	South- west	Denali/ McKinley
1. Include Additional Towns/Areas	22 %	31 %	26 %	48 %	29 %
2. Fish	15	13	13	5	12
3. See Additional Attractions/Day Trip	16	13	14	14	14
4. See Wildlife	14	12	11	16	14
5. Recreational Activities	10	10	15	15	10
6. Flightsee	10	8	6	-	8
7. Take Train	3	2	2	-	1
8. Change Length of Stay/ Budgeted Time Differently	1	2	2	-	2
9. Make Specific Purchases/ Shop In General	2	<1	<1	-	<1
10. Take Ferry	1	1	2	-	1
11. Enjoy Night life/Entertainment	1	<1	<1	-	<1
12. Other	8	8	9	-	8

What Did You Do In Alaska That You Had NOT Planned To Do?

Many Vacation/Pleasure visitors also found that they were able to include additional activities that they had not originally planned. Most VPs were able to incorporate visiting another attraction to their schedule. This was true for more than four of ten of VPs visiting Southwest, for three of ten VPs to Southeast and Southcentral and for one-quarter of VPs to Interior/North and Denali/McKinley.

Other common unplanned activities added to itineraries included recreational activities, flightseeing, and visitation of other towns and areas.

Fishing was added to the itineraries of nearly one-quarter of Southwest VPs, three percent of VPs to Southeast and Denali/McKinley and four percent of VPs to Southcentral and Interior/North.

Table IV-E

What Did You Do In Alaska That You Had NOT Planned To Do? Vacation/Pleasure Visitors - Summer 1993 (By Region Visited)

	South- east	South- central	Interior/ North	South- west	Denali/ McKinley
1. Saw Additional Attractions/Day Trips	31 %	28 %	25 %	43 %	25 %
2. Added Recreational Activities	16	20	15	28	20
3. Went Flightseeing	17	19	17	1	19
4. Visited Additional Towns/Areas	8	9	13	4	10
5. Made Specific Purchases/ Shop In General	7	4	4	—	4
6. Went Fishing	3	4	4	24	3
7. Saw Wildlife	2	1	<1	—	<1
8. Enjoyed Night life/Entertainment	2	2	2	—	1
9. Changed Length of Stay/ Budgeted Time Differently	1	2	2	1	2
10. Rode Train	1	1	<1	—	<1
11. Took the Ferry	1	1	1	—	1
12. Went Wilderness Camping	—	<1	<1	—	<1
13. Other	11	11	16	1	12

Vacation/Pleasure Visitor Travel Patterns

Entry and Exit Modes by Region Visited

Entry and Exit patterns among VPs to Alaska's five regions remained consistent across survey periods with some minor fluctuations. Cruise ship remained the leading entry and exit mode among Southeast VPs followed by Domestic Air and Highway.

Domestic Air dominated Southcentral entry and exit patterns. The primary entry/exit mode used by VPs to Interior/North was also air, however, nearly one-third also utilized the Highway. Southwest entry and exit was overwhelmingly Domestic Air. Nearly half of Denali/McKinley visitors entered and exited Alaska via air. Nearly equal portions traveled in and out of Alaska by Cruise ship and Highway.

Domestic Air increased its domination among entry and exit travel modes between 1989 and 1993. In Southeast, the Domestic Air entry market increased 5% and the exit market 3%. Southcentral Domestic Air usage jumped with entry increasing 2% and exit, 3%. These Domestic Air market share increases occurred in all regions with the exception of Southwest which posted a decrease in Air exit patterns of 5%.

Table IV-F

**Entry Mode Into Alaska
By Region Visited
Vacation/Pleasure Visitors - Summer 1993
(Percent of Each Region's Visitors)**

	South-east	South-central	Interior/North	South-west	Denali/McKinley
Domestic Air	27 %	50 %	40 %	83 %	48 %
Cruise Ship	53	25	22	3	22
Highway ¹	14	18	30	5	23
Ferry	5	4	7	4	6
International Air	<1	2	1	5	2

¹ Highway mode includes personal vehicles only. Not included are motorcoaches and trucks.

Table IV-G

**Exit Mode From Alaska
By Region Visited
Vacation/Pleasure Visitors - Summer 1993
(Percent of Each Region's Visitors)**

	South-east	South-central	Interior/North	South-west	Denali/McKinley
Domestic Air	30 %	55 %	43 %	80 %	49 %
Cruise Ship	49	20	17	5	18
Highway ¹	14	18	31	7	23
Ferry	6	5	7	2	7
International Air	1	3	2	5	4

¹ Highway mode includes personal vehicles only. Not included are motorcoaches and trucks.

Total Mode Market By Region Visited

Vacation/Pleasure mode use reports the total number of visitors using a travel mode to enter, exit, or travel round-trip. Mode use analysis provides insight into the relative size and importance of each transportation mode.

Though some transportation modes such as Domestic Air and Cruise Ship dominated other forms of travel, all transportation entry and exit modes were important to each of Alaska's regions. For instance, the State Ferry was an important transportation mode to the Interior and Denali/McKinley, 13% and 12% of the markets respectively.

The largest market in Southeast was Cruise ship totaling 316,000. The largest portion of VP travelers were on a package trip, many cruising round-trip through Southeast's Inside Passage. Domestic Air followed carrying 218,000 VPs in and/or out of Southeast. International Air mode played a small role in the Southeast market.

Southcentral VPs primarily used Domestic Air. Cruise ship usage also played a significant role with nearly 170,000 or 41% traveling via this mode. Highway was the third most important travel mode in Southcentral followed by the Ferry and International Air.

Visitors to Interior/North, Denali/McKinley and Southwest also made heavy use of Domestic Air. As in other regions Cruise Ship was the second most used mode, followed by Highway, the Ferry, and International Air, except in Southwest.

Table IV-H

**Mode Use
By Region Visited
Vacation/Pleasure Visitors - Summer 1993
(Number of Each Region's Visitors)**

	South- east	South- central	Interior/ North	South- west	Denali/ McKinley
Domestic Air	218,400	298,800	154,400	22,200	190,400
Cruise Ship	316,400	169,200	94,100	2,200	106,300
Highway ¹	79,700	85,800	86,100	1,800	73,500
Ferry	45,800	33,200	31,300	900	31,200
International Air	4,800	14,600	6,000	1,700	10,900

¹ Highway mode includes personal vehicles only. Not included are motorcoaches and trucks.

Vacation/Pleasure Visitor Travel Type by Region Visited

Travel type of Vacation/Pleasure visitors varied according to the region visited. The greatest portion of Southeast visitors were on a package trip (72%), similar to 1989. Only 15% traveled Independently and 13% on an Inde-Package trip. The majority of Southeast VP visitors traveled on a round-trip cruise, cruise/tour or air/cruise package.

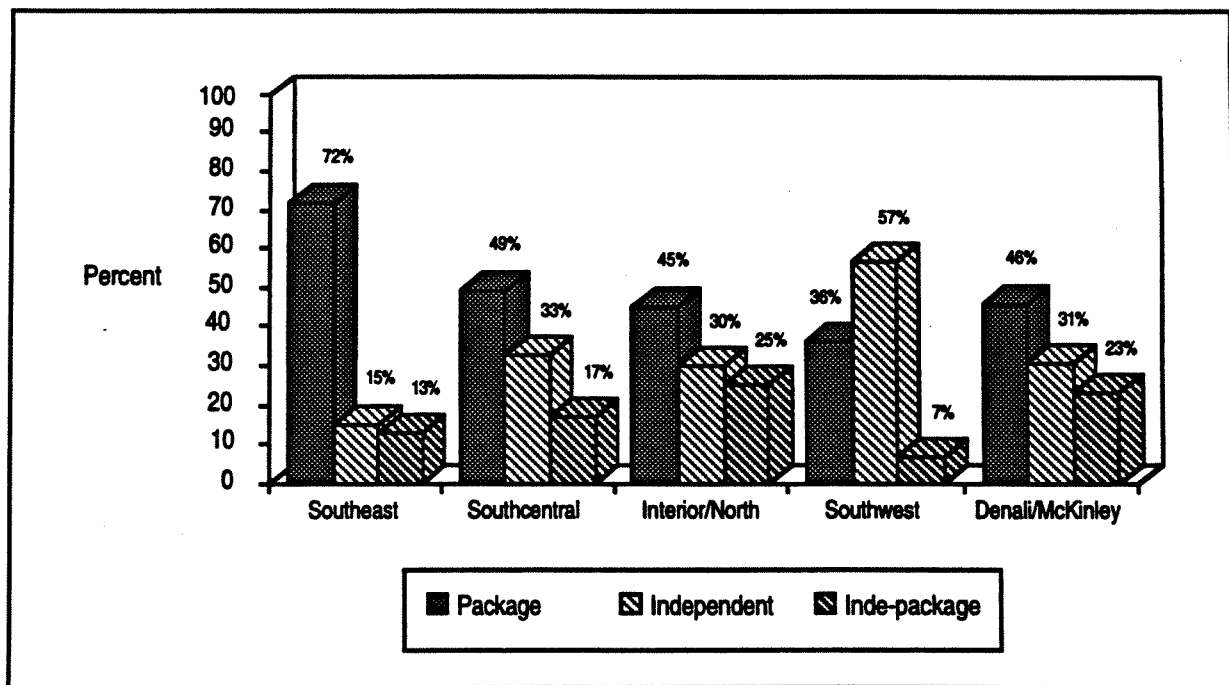
Southcentral travel type disbursement shifted between 1989 and 1993. The Package market increased 3% and the Independent market rose from 27% to 33%. Inde-Package numbers dropped a full 10%.

Interior/North and Denali/McKinley visitor travel type resembled Southcentral. The majority were Package visitors followed by Independent and Inde-Package travelers. The balance between Package and Independent visitors shifted in Denali/McKinley between 1989 and 1993. The Inde-Package market decreased 10% and the Independent market increased to 31% from 23%.

Southwest visitor travel type showed the greatest variation with the bulk of visitors falling in the Independent category. More than one-third were package and only 7% fell into the Inde-Package category.

Graph IV-D

**Travel Type of Regional Visitors
Vacation/Pleasure Visitors - Summer 1993**



Vacation/Pleasure Visitor Length of Stay by Region Visited

The average length of stay of Vacation/Pleasure visitors varied between regions. Visitors to Southeast averaged the fewest number of nights in Alaska. Southwest visitors spent the greatest amount of time on their trip averaging 14 nights. This was a significant increase over 1989, when they averaged about 10 nights while in Alaska.

Visitors to Interior/North and Denali/McKinley stayed thirteen nights in Alaska increasing their stay by one night. Southcentral visitors also increased their time in Alaska by one night shifting from 11.4 to 12.1.

Southcentral visitors spent the longest time within the region visited averaging about six nights. Visitors to Southwest also spent a longer time (5.3 nights) within the region. Visitors to the Interior and Denali spent the least amount of time within the Interior and Denali.

Vacation/Pleasure visitors to Southeast and Southcentral spent around half of their time on their Alaska trip within Southeast and Southcentral. Visitors to Denali/McKinley spent the least amount of time of their Alaska trip within Denali.

Table IV-I

Length of Stay By Region Visited Vacation/Pleasure Visitors - Summer 1993

	South- east	South- central	Interior/ North	South- west	Denali/ McKinley
Length of Stay in Alaska (Average number of nights)	8.8	12.1	13.5	14.3	13.2
Length of Stay in Region (Average number of nights)	4.5	5.6	3.0	5.3	1.9
Percent of Alaska Trip Time in Region	53%	48%	24%	44%	17%

Vacation/Pleasure Visitor Length of Stay by Community

As described in the previous section, the length of stay by Vacation/Pleasure visitors varied between regions. Similar to 1989, VPs to Southeast averaged 4.5 nights within the region, with the majority of time spent at sea, sailing on a cruise vessel or on the State Ferry. On land, visitors also spent the most amount of time in Juneau, Skagway and in wilderness locations. Wilderness locations were not included in the 1989 survey. The consistent use of this type of lodging in all regions points to the increase in popularity of wilderness adventure tours as well as growth in the ecotourism market.

VPs averaged nearly six nights in Southcentral, up slightly from 1989. They spent the most time in Anchorage (two nights). Southcentral VPs also spent time at sea perhaps sailing Prince William Sound, cruising the Gulf of Alaska or sailing the Alaska Marine Highway.

Visitors to the Interior spent two of their three nights within the region in Fairbanks. Tok hosted a fair portion for at least one night. These two communities were on the highly popular motorcoach routes that traveled through Alaska and Canada's Yukon Territory.

VPs spent five nights in Southwest. The Aleutian Islands hosted Southwest VPs two nights on average. Visitors to Iliamna and Kodiak stayed an average of one night. Wilderness locations drew some Southwest visitors for one night as well.

The length of stay in Denali/McKinley changed slightly increasing from 1.6 in 1989 to 1.9 in 1993. Denali was generally not a long-stay destination and included as a stop on a longer itinerary. The short length of stay can also be attributed in part, to the large number of Package visitors who stayed in the area one night as part of a tour.

Table IV-J

Length of Stay by Community
Vacation/Pleasure Visitors - Summer 1993
(Average Number of Nights Spent by Regional Visitors in Region and Community)

	Average # of Nights
Southeast	4.5
At Sea	3.0
Ketchikan	0.2
Wrangell	-
Petersburg	-
Sitka	0.1
Juneau	0.3
Haines	0.2
Skagway	0.3
Glacier Bay	0.1
Wilderness Locations	0.3
Other Southeast Communities	0.1
Southcentral	5.6
At Sea	0.5
Anchorage	2.4
Homer	0.4
Soldotna	0.4
Seward	0.3
Other Kenai Peninsula Communities	0.1
Wasilla	0.2
Kenai	0.2
Palmer	0.1
Glennallen	0.1
Valdez	0.3
Prince William Sound	-
Cordova	-
Whittier	-
Wilderness Locations	0.3
Other Southcentral Communities	0.3
Interior/North	3.0
Fairbanks	1.9
Tok	0.5
Kotzebue	0.1
Nome	0.2
Prudhoe Bay	-
Barrow	-
Wilderness Locations	0.2
Other Interior/North Communities	0.2
Southwest	5.3
At Sea	-
Bethel	-
Dillingham	0.1
Kodiak	0.7
Katmai	0.5
Iliamna	0.9
King Salmon	0.3
Pribilof Islands	0.1
Aleutian Islands	1.5
Wilderness Locations	0.6
Other Southwest Communities	0.6
Denali/McKinley	1.9

Lodging Type of Vacation/Pleasure Visitors by Region Visited

Lodging Type Use

Use of various lodging types was unique to each region. Most visitors to Southeast used cruise ships for lodging during their stay in Southeast. Almost two of ten visitors stayed in hotel/motels. Twelve percent of Southeast VPs used the State Ferry for lodging and another twelve percent used RV/campgrounds.

VP visitors to Southcentral and Interior/North mostly used hotel/motel accommodations. In Southcentral more than one-third also used cruise ships, up 5% from 1989. Another two of ten Southcentral visitors utilized RV/campgrounds. Private homes accommodated another 14%. RV/campgrounds were also popular among visitors to the Interior/North with three of ten using this form of accommodation.

Resorts/lodges and hotel/motel were widely used by VPs in the Southwest, with one-third using each lodging type. Southwest visitors also made wide use of Wilderness locations, perhaps camping out or staying at fish camps.

The majority of Denali/McKinley visitors (45%) used resort/lodges. Nearly one-third also made use of RV/campgrounds and nearly one-quarter stayed in hotel/motels.

Table IV-K

Lodging Type Use By Region Visited Vacation/Pleasure Visitors - Summer 1993 (Percent of Each Region's Visitors)

Lodging Type	South-east	South-central	Interior/ North	South-west	Denali/ McKinley
Hotel/Motel	19 %	55 %	61 %	33 %	23 %
Resort/Lodge	5	5	2	33	45
Bed & Breakfast	2	9	5	8	1
Private Home	2	14	7	15	<1
RV/Campground	12	21	30	10	29
Cruise Ship	71	35	-	-	-
Ferry	12	<1	-	3	-
Wilderness	3	5	4	26	4
Other	<1 %	3 %	1 %	- %	1 %

Length of Stay by Lodging Type

The following discussion details the length of stay in each lodging type by visitors using that lodging type. Though most visitors to Southeast stayed on cruise ships (70%) when in Southeast they only spent four nights on average on this type of accommodation. The lodging type used for the greatest length of stay was wilderness which included camping in remote locations. The average length of stay by visitors to Southeast for private homes was also high averaging five nights, but decreased nearly four nights between 1989 and 1993. Resort/lodge length of stay increased between 1989 and 1993 from 2.1 to 3.4.

User length of stay in Southcentral was longer than any other region for private homes and RV/campground. Average length of stay in wilderness locations was also considerable averaging slightly over five nights. The length of stay in private homes diminished, while it increased at RV/campgrounds between the two survey periods. Even though the majority of Southcentral VPs utilized hotel/motels they averaged only two nights in this lodging type.

Interior/North VPs averaged the greatest length of time, one week, in private homes, an increase over 1989. They also averaged longer lengths of time at wilderness locations and RV/campgrounds.

Southwest visitors averaged the greatest length of time (12.0) on cruise ships and in wilderness areas (8.9). Cruise Ship opportunities, generally new to this region, involved longer cruises to very remote locations. Resort/lodges were also heavily used (54% of Southwest VPs) with visitors averaging five nights.

Denali/McKinley visitors stayed the longest in wilderness locations, one week on average. RV/campground and bed and breakfasts were also used for longer periods of time.

Table IV-L

Length of Stay by Lodging Type By Region Visited Vacation/Pleasure Visitors - Summer 1993 (Average Number of Nights by Users of Each Type Only)

Lodging Type	South-east	South-central	Interior/North	South-west	Denali/McKinley
Hotel/Motel	2.2	2.4	1.9	3.4	1.5
Resort/Lodge	3.4	2.6	1.7	5.4	1.4
Bed & Breakfast	3.5	2.9	2.0	1.0	2.2
Private Home	5.1	8.5	7.2	4.8	3.8
RV/Campground	4.4	8.5	3.9	2.3	2.7
Cruise Ship	4.0	1.4	—	12.0	—
Ferry	2.0	1.5	—	1.4	—
Wilderness	10.5	5.1	4.5	8.9	7.4
Other	2.8	8.0	6.8	—	5.4

Lodging Type Use of Vacation/Pleasure Visitors by Community

Data collected in the Visitor Opinion Survey, provided valuable lodging type use information by community including the percent of visitors to a region using a lodging type within the community as well as the average number of nights the type of lodging was used. This useful information is presented in the following two tables, Table IV-M and Table IV-N.

A quick perusal of the two tables shows the varied degree of lodging type use patterns for each community and by region. To understand the information the tables should be read across rather than from top to bottom. For example, among Vacation/Pleasure visitors to Ketchikan, nearly six of ten stayed in hotel/motel accommodations. Another quarter utilized RV/campground.

Table IV-J indicates that among hotel/motel users to Ketchikan the average length of stay was nearly two nights. Among visitors using RV/campground the average length of stay was slightly over five nights.

A combination of the information from the two tables provides a quick assessment of the role each lodging type plays in each of Alaska's communities.

Table IV-M

Lodging Type Use
Vacation/Pleasure Visitors - Summer 1993
 (Percent of Regional Visitors Using Lodging by Each Community)

	Hotel/ Motel	Resort/ Lodge	Bed & Breakfast	Private Home	RV/ Campground	Cruise Ship	Ferry	Wilderness Other
Southeast								
At Sea	<1 %	— %	— %	<1 %	— %	85 %	15 %	— %
Ketchikan	59	9	7	3	24	—	—	3
Wrangell	55	—	9	5	32	—	—	—
Petersburg	36	—	14	9	38	—	—	—
Sitka	33	12	29	1	26	—	—	1
Juneau	71	<1	6	9	15	—	—	—
Haines	23	1	1	—	70	—	—	3
Skagway	52	1	2	—	46	—	—	3
Glacier Bay	11	69	5	—	8	—	—	23
Wilderness Locations	—	28	—	—	2	—	—	70
Other Southeast Locations	20	32	13	8	31	—	—	—
Southcentral								
At Sea	— %	— %	— %	— %	— %	99 %	1 %	— %
Anchorage	66	1	7	13	16	—	—	<1
Kenai	31	14	4	<1	46	—	—	5
Soldotna	18	7	15	12	43	—	—	7
Seward	24	—	10	3	56	—	—	6
Other Kenai Peninsula Communities	4	—	—	19	76	—	—	—
Homer	21	<1	12	6	59	—	—	4
Wasilla	6	—	9	19	62	—	—	—
Palmer	20	—	1	3	75	—	—	—
Glennallen	18	1	1	1	75	—	—	3
Valdez	21	5	12	2	62	—	—	1
Prince William Sound	—	—	—	—	100	—	—	—
Cordova	90	10	—	—	—	—	—	—
Whittier	36	—	—	—	64	—	—	—
Wilderness Locations	—	12	—	5	35	—	—	50
Other Southcentral Locations	17	5	1	27	51	—	—	9
Interior/North								
Fairbanks	61 %	1 %	5 %	6 %	27 %	— %	— %	1 %
Tok	38	<1	<1	—	61	—	—	1
Kotzebue	87	—	—	13	—	—	—	—
Nome	52	—	4	20	13	—	—	12
Barrow	87	—	—	—	9	—	—	—
Prudhoe Bay	91	—	—	—	9	—	—	—
Wilderness Locations	—	7	—	1	48	—	—	44
Other Interior Locations	26	4	1	12	47	—	—	7
Southwest								
At Sea	— %	— %	— %	— %	— %	— %	100 %	— %
Bethel	—	—	—	—	100	—	—	—
Dillingham	—	7	—	93	—	—	—	—
Kodiak	49	—	3	23	23	—	—	—
Katmai	—	95	—	—	5	—	—	—
Iliamna	—	32	39	—	30	—	—	39
King Salmon	67	30	—	2	—	—	—	—
Pribilof Islands	100	—	—	—	—	—	—	—
Aleutian Islands	—	—	—	48	—	—	—	52
Wilderness Locations	—	33	—	—	—	—	—	69
Other Southwest Locations	54	46	—	—	—	—	—	—
Denali/McKinley	23 %	45 %	1 %	<1 %	29 %	— %	— %	4 %

Table IV-N

Lodging Type Use
Vacation/Pleasure Visitors - Summer 1993
(Average Number of Nights Spent by Regional Visitors in Region and Community)

	Hotel/ Motel	Resort/ Lodge	Bed & Breakfast	Private Home	RV/ Campground	Cruise Ship	Ferry	Wilderness Other
Southeast								
At Sea	2.3	-	-	2.0	-	3.2	2.0	-
Ketchikan	1.7	3.8	2.1	7.0	5.1	-	-	5.0
Wrangell	1.9	-	1.0	2.0	2.6	-	-	-
Petersburg	1.8	-	1.3	8.1	2.1	-	-	-
Sitka	2.0	4.0	2.0	15.0	4.8	-	-	4.0
Juneau	1.8	2.0	2.9	4.6	3.2	-	-	-
Haines	1.1	1.0	12.5	18.0	2.6	-	-	1.3
Skagway	1.2	1.0	1.2	-	1.9	-	-	2.0
Glacier Bay	-	-	-	-	-	-	-	-
Wilderness Locations	-	4.2	-	-	3.6	-	-	15.6
Southcentral								
At Sea	2.3	-	-	2.0	-	3.2	2.0	-
Anchorage	2.0	2.1	2.5	6.8	2.8	-	-	2.7
Kenai	-	-	-	-	-	-	-	-
Soldotna	-	-	-	-	-	-	-	-
Seward	1.4	-	1.4	3.8	2.0	-	-	1.8
Other Kenai Peninsula Communities	2.4	-	-	3.7	4.7	-	-	-
Homer	1.6	1.0	1.3	4.6	2.3	-	-	1.5
Wasilla	1.5	-	1.0	11.7	2.1	-	-	-
Palmer	1.7	-	1.0	7.5	1.6	-	-	-
Glennallen	-	-	-	-	-	-	-	-
Valdez	1.3	2.1	1.3	2.0	1.9	-	-	1.0
Prince William Sound	-	-	-	-	-	-	-	-
Cordova	1.9	1.0	-	-	-	-	-	-
Whittier	1.0	-	-	-	1.0	-	-	-
Wilderness Locations	-	2.3	-	2.2	2.6	-	-	4.8
Interior/North								
Fairbanks	1.6	1.8	2.0	6.7	2.8	-	-	1.2
Tok	1.2	1.7	1.5	-	1.7	-	-	1.3
Kotzebue	1.0	-	-	6.0	-	-	-	-
Nome	1.1	-	1.0	8.5	1.7	-	-	6.6
Barrow	1.0	-	-	-	1.0	-	-	-
Wilderness Locations	-	2.0	-	2.0	3.0	-	-	6.5
Southwest								
At Sea	2.3	-	-	2.0	-	3.2	2.0	-
Bethel	-	-	-	-	6.0	-	-	-
Dillingham	-	13.0	-	1.0	-	-	-	-
Kodiak	4.4	13.0	1.0	7.0	3.9	-	-	-
Katmai	-	6.2	-	-	6.0	-	-	4.0
Iliamna	-	7.9	1.0	-	1.0	-	-	5.0
King Salmon	2.0	1.1	-	10.0	-	-	-	-
Pribilof Islands	2.9	-	-	-	-	-	-	-
Aleutian Islands	-	-	-	7.0	-	-	-	21.0
Wilderness Locations	-	4.5	-	-	-	-	-	5.4
Other Southwest Locations	5.6	6.0	-	-	3.0	-	-	-
Denali/McKinley	1.5	1.4	2.2	3.8	2.1	-	-	6.9

Regional Visitor Overlap Patterns

Vacation/Pleasure visitors to Alaska generally visit more than one region. As in 1989, more than half of visitors to Southeast spent time in Southcentral. More than four of ten visitors to Southeast visited Denali/McKinley while 38% traveled to the Interior/North. Very few Southeast visitors ventured to Southwest.

More than six of ten visitors to Southcentral traveled to Denali/McKinley and to Southeast. Over half also visited the Interior/North and 6% traveled to Southwest.

VP visitors to the Interior/North took in quite a bit of Alaska with very high regional visitor overlap. More than nine of ten visitors to the Interior passed through Southcentral and 87% visited Denali. Another 4% made it to Southwest.

Denali/McKinley VPs were similar to those from the Interior traveling widely throughout the state. Nearly 100% visited Southcentral and nearly 80%, the Interior/North region. Seven of ten Denali VPs journeyed to the Southeast panhandle.

Southwest visitors mostly traveled through Southcentral (88%). More than one-third passed through the Interior and Denali/McKinley and one-quarter to Southeast.

Table IV-O

**Regional Visitor Overlap
By Region Visited
Vacation/Pleasure Visitors - Summer 1993
(Percent of Each Region's Visitors)**

Also Visited	Regions Visited				
	South-east	South-central	Interior/ North	South-west	Denali/ McKinley
Southeast	100%	63%	73%	26%	70%
Southcentral	56	100	93	88	99
Interior/North	38	55	100	34	79
Southwest	1	6	4	100	3
Denali/McKinley	41	65	87	34	100

Community Visitor Overlap

As indicated in the previous discussion, Vacation/Pleasure visitors traveled widely throughout Alaska, visiting a large number of communities. VPs to Southeast traveled to many Southeast communities. The majority made it through Southeast's major population centers, Juneau (83%) and Ketchikan (79%). They also traveled widely through the Southcentral region with more than half visiting Anchorage and three of ten traveling to Seward. Denali/McKinley attracted more than four of ten VPs to Southeast. Fairbanks was close, visited by 37% of Southeast VPs. Many of these VPs were on cruise/tour packages or traveling independently.

A majority of VPs to Southcentral (65%) traveled to Denali. More than half also visited Juneau, Skagway, Seward and Fairbanks. One-third traveled to Glacier Bay and three of ten visited Sitka and Tok. Very few of Southcentral VPs trekked to Southwest communities.

Interior/North VPs most often visited Anchorage (92%) and Denali (87%). More than 60% of VPs to the Interior passed through Skagway, probably doing a loop through the Yukon Territory. This route also took more than half through Tok.

Most VPs to Southwest traveled widely within the Southwest region. Travels beyond Southwest took them to Anchorage (88%). More than one-third found their way to Denali and one-quarter visited Fairbanks in the Interior.

Vacation/Pleasure visitors to Denali/McKinley more than likely traveled to Anchorage (98%). Nearly eighty percent visited Fairbanks as well. Denali is often the link for visitors traveling between Anchorage and Fairbanks, either by train or motorcoach. Nearly six of ten Denali visitors traveled to Skagway. More than half visited Juneau and Seward.

Table IV-P

Community Visitor Overlap
Vacation/Pleasure Visitors - Summer 1993
 (Percent of Each Region's Visitors)

Visitors to These Regions:	South- east (463,100)	South- central (411,000)	Interior/ North (243,900)	South- west (25,600)	Denali/ McKinley (269,600)
Visited These Communities:					
Southeast					
Juneau	83 %	52 %	54 %	17 %	54 %
Ketchikan	79	47	48	12	48
Skagway	67	52	61	14	58
Glacier Bay	55	33	32	8	32
Sitka	47	31	27	12	29
Haines	24	18	23	3	20
Wrangell	12	10	11	4	9
Petersburg	7	6	10	3	8
Wilderness Areas	4	2	3	6	3
Other Southeast Communities	4	2	3	1	3
Southcentral					
Anchorage	52	94	92	88	98
Seward	30	51	51	32	53
Kenai	13	31	32	22	34
Soldotna	8	25	24	30	27
Palmer	11	27	30	28	31
Valdez	16	27	29	23	29
Prince William Sound	16	26	30	20	32
Homer	10	26	28	33	30
Wasilla	10	25	27	29	31
Glennallen	12	22	32	17	29
Whittier	11	18	19	13	22
Other Kenai Peninsula Communities	6	14	13	16	15
Wilderness Areas	2	7	5	19	7
Cordova	1	4	4	13	5
Other Southcentral Communities	4	10	8	11	10
Interior/North					
Fairbanks	37	51	90	25	77
Tok	22	31	55	10	44
Nome	3	4	8	<1	5
Kotzebue	2	3	7	<1	5
Wilderness Areas	1	2	4	2	3
Prudhoe Bay	1	2	4	1	3
Barrow	<1	1	1	<1	1
Other Interior Communities	4	6	11	3	8
Southwest					
King Salmon	<1	2	<1	30	<1
Iliamna	-	1	1	23	<1
Aleutian Islands	-	1	<1	18	1
Kodiak	<1	1	1	16	1
Katmai	<1	1	<1	15	<1
Pribilof Islands	<1	1	1	13	1
Dillingham	<1	1	1	13	1
Bethel	-	<1	-	5	-
Wilderness Areas	<1	1	<1	9	<1
Other Southwest Communities	<1	1	<1	17	<1
Denali/McKinley	41 %	65 %	87 %	34 %	100 %

Regional Visitors to Attractions

Vacation/Pleasure visitor travel patterns to various attractions is enlightening for the Alaska visitor industry. As in the case of communities, there was a great deal of overlap between regional visitors and attractions in other regions. VPs in Alaska traveled widely throughout the state.

VPs to Southeast concentrated most of their sightseeing within Southeast itself, with the majority enjoying Ketchikan Totems, Mendenhall Glacier and Skagway's Historic Gold Rush District. These attractions were a part of most cruises and cruise/tours. Denali/McKinley attracted four of ten Southeast VPs. One-quarter also visited Portage Glacier the Transalaska Pipeline and the University of Alaska, Fairbanks. Another 20% traveled the Alaska Highway. Few VPs to Southeast made it into the Southwest region.

Most VPs to Southcentral visited many of the attractions located in the Anchorage area. Nearly two-thirds traveled to Denali/McKinley. Southeast's Inside Passage attracted nearly half of VPs to Southcentral. Ketchikan Totems, the Mendenhall Glacier and Skagway's Historic Gold Rush District were other popular Southeast locations for Southcentral VPs. The Transalaska Pipeline and the Alaska Highway were also popular attractions for VPs to Southcentral.

VPs to the Interior were widely traveled visiting a large number of attractions in all regions. Nearly 90% visited Denali/McKinley and more than half visited Skagway's Historic Gold Rush District, Portage Glacier, the Inside Passage, and traveled the Alaska Highway. Fewer VPs to the Interior traveled to attractions in the Southwest.

VPs to the Southwest concentrated most of their travel in the Anchorage area and in the Southwest region itself. Four of ten visited Portage Glacier and another 20% visited Columbia Glacier. Within Southwest itself, most VPs traveled to the Aleutian Islands and Katmai National Park, known for its Valley of Ten Thousand Smokes.

A significant portion of Denali/McKinley visitors traveled in Southcentral visiting Portage Glacier (59%), and the Anchorage Museum of History and Art (40%). Denali visitors also visited Southeast attractions such as Skagway's Gold Rush Historic District, the Inside Passage and Mendenhall Glacier. In the Interior, many visited the Transalaska Pipeline, the University of Alaska-Fairbanks, including the University of Alaska Museum.

Table IV-Q

Regional Visitors to Attractions
Vacation/Pleasure Visitors - Summer 1993
 (Percent of Each Region's V/P Visitors)

	South- east (463,100)	South- central (411,000)	Interior/ North (243,900)	South- west (25,600)	Denali/ McKinley (269,600)
Southeast					
Inside Passage	80 %	47	51	9	50
Ketchikan Totems	68	38	38	8	38
Mendenhall Glacier	67	40	45	8	43
Skagway's Historic Gold Rush District	61	45	56	11	52
Glacier Bay	53	28	28	8	28
Sitka's Russian Church & Dancers	39	24	21	8	21
Sitka National Historic Park	33	20	17	8	17
Alaska State Museum	29	22	25	12	25
Misty Fjords National Monument	12	6	5	-	5
Chilkat Bald Eagle Preserve	10	8	11	1	9
Tracy Arm Fjords	6	3	4	5	4
Chilkat Dancers	6	4	4	1	3
Eaglecrest Ski Area	1	<1	<1	-	<1
Southcentral					
Anchorage Area					
Portage Glacier	25	64	54	40	59
Anchorage Museum of History/Art	20	41	37	6	40
Chugach State Park	7	22	18	13	21
Alyeska Ski Mine	6	18	14	18	15
Lake Hood Air Harbor	6	15	10	14	14
St. Nicholas Russian Orthodox Church & Native Spirit Houses	7	15	14	9	15
Potter Point State Game Refuge	2	8	5	11	8
Crow Creek Mine	1	7	5	3	7
Prince William Sound					
Prince William Sound	18	34	28	18	31
Columbia Glacier	16	29	26	21	28
Valdez Pipeline Terminal	11	23	22	14	22
College Fjord	14	22	17	14	20
Kenai Peninsula					
Kenai River	7	29	18	16	22
Resurrection Bay	9	23	18	13	22
Kenai National Wildlife Refuge	5	17	13	5	16
Kenai Fjords National Monument	4	13	11	6	12
Kachemak Bay	2	9	6	4	8
Matanuska-Susitna Area					
Matanuska Glacier	5	12	13	4	13
Musk Ox Farm	4	10	8	9	9
Iditarod Museum	2	7	6	2	7
Hatcher Pass Recreation Area	2	6	4	2	5
Knik Glacier	1	3	3	2	4
Independence Mine State Historic Park	1	3	2	1	3
Alaska State Fair	1	3	3	8	3
Alaska Historical and Transportation Museum	1	2	2	1	2

Regional Visitors to Attractions
Vacation/Pleasure Visitors - Summer 1993
 (Percent of Each Region's V/P Visitors)

	South- east (463,100)	South- central (411,000)	Interior/ North (243,900)	South- west (25,600)	Denali/ McKinley (269,600)
Interior/North					
Fairbanks Area					
Transalaska Pipeline	26	34	71	16	51
University of Alaska	23	32	65	17	48
University of Alaska Museum	22	29	59	13	43
Large Animal Research Station	5	8	15	8	11
Agriculture & Forestry (Experimental Farm Station)	2	3	6	<1	4
Geophysical Institute	1	1	3	<1	2
Chena River Trips	16	20	40	-	30
Alaskaland	11	17	35	13	25
Gold Panning Dredges & Saloons	13	16	33	8	24
Hot Springs	4	6	12	9	8
Other Interior Areas					
Alaska Highway	20	28	58	15	40
Tetlin National Wildlife Refuge	5	8	16	3	10
Other Northern Areas					
Transalaska Pipeline Haul Road	4	6	13	2	9
Nome - Gold Rush History	2	3	8	<1	4
Kotzebue-Eskimo Culture	2	3	7	<1	4
Brooks Range	2	3	6	<1	4
Prudhoe Bay Oil Fields	2	2	5	-	4
Gates of the Arctic National Park	1	2	3	-	2
Arctic National Wildlife Refuge	1	1	2	-	1
Barrow - Northernmost Point in North America	<1	1	1	<1	1
Southwest					
Aleutian Islands	-	1	-	35	-
Katmai National Park	<1	1	<1	34	<1
Russian Orthodox Church	<1	<1	<1	25	<1
Kodiak National Wildlife Refuge	<1	<1	<1	18	<1
Fort Abercrombie	<1	<1	<1	13	<1
Pribilof Islands	<1	<1	<1	13	<1
Baranof Museum	<1	<1	<1	12	<1
Wood River-Tikchik State Park	-	<1	<1	2	<1
Lake Clark National Park	-	<1	-	1	-
Denali/McKinley	41 %	65 %	87 %	34 %	100 %

Comparative Regional Use Patterns of Vacation/Pleasure Visitors

Vacation/Pleasure visitor use of accommodations, services, and activities in each of the five regions is detailed in Table III-M. In Southeast, VPs utilized cruise ships (62%) more than any other lodging type. Hotel/motels were used more often in Southcentral and the Interior/North followed by RV/campgrounds. Southwest VPs used hotel/motels equally as much as resort/lodges. Denali/McKinley visitors were more likely to stay in resort/lodges, or RV/campgrounds than any other regional group.

Cruise Ship and the Alaska Marine Highway (Ferry) were the most used forms of transportation in Southeast. Southcentral regional VPs were more likely to travel by motorcoach (27%) or train (25%). This was true for Interior/North regional VPs as well. The Interior and Denali/McKinley were heavily affected by tour options that included motorcoach routes and transfers to the Alaska Railroad through Denali. Southwest visitors primarily used air for instate transportation.

Southcentral's VPs led all other regional users in restaurants and night-life usage. Interior/North regional visitors were second. It is not surprising that VPs in these two regions were the highest participants in restaurants and night-life, since Alaska's two main population centers, with a variety of restaurants and night spots are located in these regions.

Visitors to Southeast were the greatest shoppers. Southcentral and Interior/North regional visitors were active shoppers with three-quarters of visitors to Southcentral and nearly two-thirds of Interior/North regional visitors engaging in this activity.

More than seven of ten VPs to Southeast utilized visitor information centers. Six of ten visitors to Southcentral, Interior/North and Denali also visited information centers. Southwest regional visitors utilized information centers the least.

Southeast regional VPs participated in many sightseeing opportunities, particularly city tours. Native Cultural presentations were attended by more than one-third of Southeast visitors to the region. Most visitors to Southcentral also took city tours, however, they were more likely to also engage in day cruises as well. Visitors to the Interior/North took riverboat cruises, city tours, and attended Native cultural presentations. Three-quarters of VPs to Denali participated in a park bus tour. Southwest visitors were less inclined to participate in sightseeing, which is a primarily urban activity.

Photography, casual walking, and wildlife watching were consistently popular activities among VPs to all regions. Photography was most popular with Denali regional visitors as was wildlife watching. Bird watching was also a high ranking activity among visitors to the state's regions, particularly in Denali. Visitors to Southwest were active fishers, with many (50%) participating in freshwater fishing.

Table IV-R

**Comparative Regional Use Patterns
Accommodations, Services and Activities
Vacation/Pleasure Visitors - Summer 1993
(Percent of Regional Visitors Using)**

	South- east	South- central	Interior/ North	South- west	Denali/ McKinley
Lodging					
Hotel/Motel	17 %	48 %	52 %	29 %	19 %
Resort/Lodge	4	5	2	29	39
Bed & Breakfast	2	9	4	7	1
RV/Campground	11	20	26	8	24
Cruise Ship	62	16	-	-	-
Ferry	9	1	-	2	-
Other	1	2	2	5	3
Transportation					
Air	8	15	18	58	4
Ferry	13	6	-	5	-
Motorcoach	8	27	35	1	31
Cruise Ship	53	16	-	-	-
Rental Car	4	18	9	6	10
Rental RV	1	3	3	-	3
Train	6	25	24	-	32
Restaurants/Night life	52	70	66	36	60
Shopping	81	75	63	15	49
Visitor Information Centers	71	61	59	20	58
Sightseeing					
City Tours	54	32	38	7	-
Day Cruises	25	29	-	<1	-
Riverboat Cruises	-	-	42	-	-
Park/Bus Tour	-	-	-	-	75
Flightseeing	27	8	5	7	9
Native Cultural Presentations	36	22	37	-	-
Alaska Shows/Entertainment	31	19	20	<1	-
Other Tours	25	15	8	7	7
Cultural Attractions/Museums	44	49	36	10	16
Activities					
Bird Watching	24	24	17	17	29
Camping	12	21	23	15	20
Casual Walking	53	52	45	29	51
Hiking	12	21	13	18	22
Hunting	<1	1	1	5	1
Photography	53	55	54	33	63
Wildlife Watching	43	43	37	30	58
Canoeing/Kayaking	4	3	1	<1	2
Rafting	6	6	2	-	13
Fishing Overall	11	18	7	35	1
Freshwater Fishing	6	18	7	50	1
Saltwater Fishing	11	15	1	15	-
Dogsledding	<1	<1	2	<1	1
Northern Lights Viewing	5	3	5	<1	2
Other	1	3	3	6	3

Vacation/Pleasure Visitor Travel Planning by Region

Alaska Trip Planning Timelines by Vacation/Pleasure Visitors

VPs decided to travel to Alaska earlier on average than All Visitors to Alaska, 7.8 months in advance as opposed to 7.2 months. Interior/North and Denali/McKinley visitors made their Alaska trip decision the earliest (9 months in advance of their departure date). More than one-third of visitors to both regions decided to visit Alaska ten months or more before the trip departure.

Southwest VPs also had long Alaska planning lead times requiring 8.4 months on average to decide to visit Alaska. More than half required ten or more months lead time. Southcentral and Southeast visitors required less time to make their Alaska trip decisions 8.1 and 7.9 months on average, respectively.

VP trip arrangements were made much closer to the departure dates, 5.0 months on average. VPs to Southwest averaged 6 months lead time to make their trip arrangements, one month more than VPs to all other regions. Trip arrangements to more remote locations can require more research and planning, particularly for Independent visitors. VPs to Southcentral averaged the least amount of time to make their trip arrangements, 5.0 months.

Graph IV-E

Alaska Planning Timelines
Vacation/Pleasure Visitors - Summer 1993
(By Region Visited)

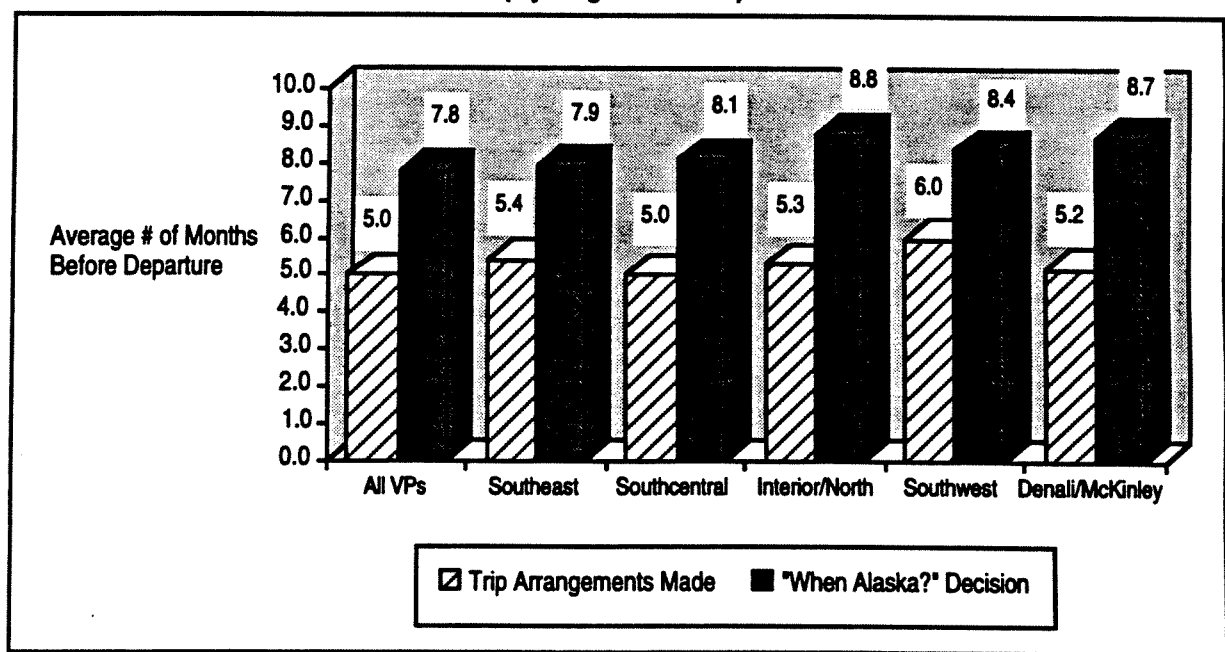


Table IV-S

**Lead Time For Alaska Season/Year Decision
By Region Visited
Vacation/Pleasure Visitors - Summer 1993
(Percent of Each Region's V/P Visitors)**

Months Before Trip	South-east	South-central	Interior/North	South-west	Denali/McKinley
1 Month or Less	6 %	8 %	4 %	7 %	5 %
2 - 3 Months	19	15	15	34	14
4 - 5 Months	10	9	11	1	10
6 - 7 Months	21	23	25	6	24
8 - 9 Months	12	11	11	-	11
10 - 12 Months	21	21	19	29	20
More Than 1 Year	12	14	16	22	16

Table IV-T

**Lead Time For Trip Arrangements
By Region Visited
Vacation/Pleasure Visitors - Summer 1993
(Percent of Each Region's V/P Visitors)**

Months Before Trip	South-east	South-central	Interior/North	South-west	Denali/McKinley
1 Month or Less	10 %	11 %	10 %	19 %	7 %
2 - 3 Months	27	32	27	26	34
4 - 5 Months	12	14	14	11	14
6 - 7 Months	28	25	29	20	28
8 - 9 Months	13	10	9	7	8
10 - 12 Months	7	7	9	9	8
More Than 1 Year	2	2	2	8	2

Vacation/Pleasure Visitor Trip Arrangements

VPs had a variety of trip arrangement options available to them. The majority of Southeast visitors (68%) bought a packaged trip in advance. Southeast gets a large portion of Package visitors, with more than one-third taking a round-trip cruise. Additionally, Southeast attracted 15% who did not buy any sort of package or tour while traveling instate. Equal portions of VPs to Southeast purchased a tour once they arrived in Alaska or bought a package trip for a portion of their Alaska vacation.

Many Southcentral visitors also paid for their entire Alaska trip prior to departure. Another three of ten did not purchase any portion of their trip prior to coming to Alaska. This is consistent with the ample (33%) portion of VPs that travel to this region as Independent visitors. Sixteen percent of Southcentral VPs bought tours once they arrived in Alaska. Another twelve percent bought a portion of their trip in advance. Interior/North and Denali/McKinley visitors exhibited similar trip arrangement patterns.

VPs to Southwest mostly traveled in Alaska without prepurchasing any portion of their trip. Nearly one-quarter of VPs to Southwest did purchase a packaged trip for some of their trip, perhaps purchasing a fishing lodge package.

Table IV-U

Trip Arrangements By Region Vacation/Pleasure Visitors - Summer 1993

How Did You Make Arrangements For Your Alaska Trip?	South- east	South- central	Interior/ North	South- west	Denali/ McKinley
1. Bought a packaged trip in advance for the entire Alaska trip	68 %	43 %	42 %	18 %	44 %
2. Did not buy a packaged trip or instate tour while in Alaska	15	29	29	57	25
3. Did not buy a packaged trip in advance for the Alaska trip, but bought tours instate	8	16	20	2	22
4. Bought a packaged trip in advance for some of the Alaska trip	8	12	8	23	10

Alaska Trip Decision Criteria

Personal reasons were the primary motivation for prompting VPs to travel to Alaska in almost all regions but Southwest. More than 60% of VPs to Interior/North, Denali/McKinley and Southeast cited personal reasons for choosing Alaska this year. These reasons included traveling with family or friends this year, or fulfilling a long time desire to travel to Alaska. Special occasions, such as anniversaries and honeymoons were strong personal reasons for 9% of Southeast VPs and 10% of Denali/McKinley VPs. Timing considerations affected between 8% and 10% of VPs to the Interior, Denali, and Southcentral.

The attractions and appeal of Alaska was the primary reason for more than one-third of Southwest VPs to come to Alaska in Summer 1993. Fishing, by far was the most cited reason. Seven percent of Southwest VPs also indicated that they were drawn to Alaska's natural attractions.

Alaska's attractions and appeal prompted about one in seven VPs to Southeast, Southcentral, and Denali and 12% of visitors to the Interior. Many visitors were attracted to Alaska by wildlife, glaciers and natural scenery. Natural attractions were the biggest draw in this category followed by fishing.

Alaska came highly recommended. Word-of-mouth endorsements encouraged many 1993 Alaska visitors, particularly in the Southwest. The desire to see friends and relatives living in Alaska was a primary reason for 13% of Southwest VPs, 9% of VPs to Southcentral, and 6% of VPs to the Interior and Denali.

Price and discount considerations affected VPs to all regions, though few were affected in Southwest. Advertising and promotions motivated between two and three percent of visitors to four of Alaska's regions.

Table IV-V

**Main Reason For "When Alaska?" Decision
By Region Visited
Vacation/Pleasure Visitors - Summer 1993
(Percent of Each Region's V/P Visitors)**

	South- east	South- central	Interior/ North	South- west	Denali/ McKinley
1. Personal Reasons	62 %	55 %	64 %	32 %	63 %
Family/Friend Related Reasons	10	9	10	16	9
Long Time Desire	10	9	11	5	10
Special Occasion	9	5	3	—	5
Timing Considerations	7	8	10	<1	9
Stage In Life	5	5	8	2	7
Financial	4	3	4	—	3
Never Been There	4	4	4	<1	4
Group Travel Opportunity	3	2	3	—	3
Wanted To Cruise	2	1	—	—	—
Other	7	9	11	7	12
2. Attractions/Appeal	14	15	12	36	14
Natural Attractions	9	10	9	7	11
Fishing	4	4	2	29	3
Adventure Travel	<1	<1	<1	—	<1
Other	<1	<1	<1	—	<1
3. Recommended By Others	7	7	7	11	6
4. Visit Friends/Relatives	1	9	6	13	6
5. Price/Discount Considerations	6	5	3	<1	5
6. Advertising/Promotion	3	3	2	1	2
7. Business	1	1	1	6	1
8. Visit All 50 States	<1	<1	<1	—	<1
9. Weather	<1	<1	—	—	—
10. Other	6	5	5	2	3

Travel History of Alaska Vacation/Pleasure Visitors

Alaska's Vacation/Pleasure visitors traveled extensively in the last five years both domestically and overseas. Europe attracted a good portion of Southeast VPs drawing nearly twenty percent in the last five years. Great Britain and Ireland were popular destinations attracting 6% of Southeast VPs. The Caribbean was a popular vacation destination for Southeast VPs visited by 13% in the last five years. Canada was also a big draw for many visitors to Southeast. Pacific Coast States attracted 16%, the hot spots being Hawaii (8%) and California (6%).

The most popular vacation destination for VPs to Southcentral in the last five years were the Pacific States including Hawaii, California, Washington and Oregon. Europe came in second attracting 15% of VPs to Southcentral. Other popular vacation destinations for Southcentral VPs included the Caribbean, ranked fourth, and Canada, in fifth place. Mexico and the Southern States tied for sixth place. Interestingly, 4% of Southcentral VPs indicated they had traveled to Alaska for a vacation in the last five years.

The Pacific Coast States were the most visited destination for Interior/North VPs. Most had traveled to Hawaii, however, there was a tie between those visiting California and Washington/Oregon. Europe and Canada attracted equal portions of Interior/North VPs, tying for second as the most visited past vacation destination. The Caribbean and Mexico were also popular past vacation destinations for VPs to the Interior with 9% indicating they had traveled to these locations in the past five years.

On the domestic side, Southwest VPs were more widely traveled in the Midwest (15%), the Mountain (10%) and Southern States (7%). International travels in the last five years drew 13% of Southwest VPs to Europe and to Australia/New Zealand. The Caribbean and Mexico were visited by 11% and 9% respectively, of Southwest VPs in the last five years. In the past, Alaska was visited by 3% of Southwest VPs. Five percent of Southwest VPs also traveled to the South Pacific and the Eastern States.

Past popular vacation destinations for Denali/McKinley VPs were similar to that of other regions. The Pacific Coast States attracted the greatest portion of visitors followed by Europe, visited by 14% and Canada visited by 11%. The Caribbean and Mexico tied for fourth place visited by 9% of Denali/McKinley VPs.

Table IV-W

Travel History of Alaska Visitors
Vacation/Pleasure Visitors - Summer 1993
Past Five Years - Vacation Destinations
(Percent of Each Region's Visitors)

	South- east	South- central	Interior/ North	South- west	Denali/ McKinley
1. Pacific Coast States	16 %	19 %	17 %	6 %	16 %
Hawaii	8	7	7	6	7
California	6	8	5	-	6
Washington/Oregon	2	4	5	-	3
2. Europe	18	15	12	13	14
Great Britain & Ireland	6	3	2	7	3
Italy	1	2	1	-	2
France	1	2	<1	-	1
3. Caribbean	13	10	9	11	9
4. Canada	12	9	12	1	11
Maritime Provinces	2	2	3	1	2
British Columbia	2	1	1	-	1
5. Mexico	8	8	9	9	9
6. Southern States	8	8	7	7	7
Florida	3	2	2	5	2
Texas	1	1	1	1	1
Washington D.C.	1	2	1	1	2
7. Mountain States	3	4	8	10	6
Arizona	2	2	3	5	2
Nevada	1	2	2	5	3
Colorado	-	-	1	-	1
Utah	-	-	-	-	-
8. Australia/New Zealand	2	4	3	13	4
9. Midwestern States	<1	1	2	15	4
10. ALASKA	1	4	2	3	2
11. Eastern States	2	2	<1	5	2
12. China	1	1	2	1	1
13. South Pacific	<1	1	<1	5	<1
14. Israel	1	1	1	-	1
15. Southeast Asia/India	<1	1	<1	<1	1
16. Japan/Korea	<1	<1	<1	-	-

Trip Information Sources

Visitors to all regions used a variety of information sources to help plan their trip. Nearly seven of ten visitors to Southeast used travel agents as a resource. About half of VPs to Southcentral, the Interior, and Denali/McKinley regions utilized travel agents. Southwest visitors used travel agents less than visitors to other regions.

Government organizations which included the Division of Tourism and the Alaska Tourism Marketing Council were also popular sources for Alaska trip information. Nearly four of ten visitors to Denali and Interior used a government organization for trip planning assistance as did one-third of Southcentral and one-quarter of Southeast visitors. The fewest portion of visitors utilizing government organizations as a resource were visitors to the Southwest.

Friends and Relatives were a popular resource for more than two of ten visitors to Southcentral and Southwest. About one in five Denali and Interior visitors also used friends and relatives. Southeast visitors were the smallest group to use friends and relatives.

Books/Brochures were another important resource for nearly one-quarter of VPs to the Interior, Denali, and Southwest. Commercial organizations, such as tour companies, and clubs/non-profit organizations provided information to VPs to all regions.

Table IV-X

**Trip Information Sources
By Region Visited
Vacation/Pleasure Visitors - Summer 1993
(Percent of Each Region's V/P Visitors)**

	South- east	South- central	Interior/ North	South- west	Denali/ McKinley
Travel Agent	69%	52%	50%	36%	50%
Government Organizations (Including Div. of Tourism)	24	32	38	20	39
Friends/Relatives	11	22	19	22	20
Books/Brochures	16	19	24	23	24
Commercial Organizations	14	11	10	20	10
Clubs/Non-Profit Organizations	9	9	11	4	10
Media	6	6	6	6	6
Previous Visits	2	4	3	12	2
Other	4	3	3	1	3

Frequent Flyer Program Use

Frequent flyer programs played an important role for Domestic Air VPs who traveled to all of Alaska's regions. Southwest visitors had the greatest number of Domestic Air traveling parties with someone using frequent flyer awards (45%). Southcentral was second with someone in 27% of the visitor parties redeeming bonus miles for their Alaska vacation. One-quarter of visitors to Interior and Denali had a member in their party using a frequent flyer program.

Southwest had the highest proportion (39%) redeeming frequent flyer awards. Southcentral came in second with 20% and Denali/McKinley was third with 18%.

Table IV-Y

Use of Frequent Flyer Mileage By Region Visited Vacation/Pleasure Visitors - Domestic Air Users - Summer 1993 (Percent of Each Region's V/P Visitors)

	South- east	South- central	Interior/ North	South- west	Denali/ McKinley
Yes	20%	27%	25%	45%	25%
No	80	73	75	55	75
# In Party Using					
One	22	28	29	13	21
Two	63	50	54	52	64
Three	—	5	7	14	3
Four	10	13	9	20	7
Five	4	4	—	—	3
Six or More	1	1	2	—	1
% of Total V/P Parties with Frequent Flyer Mileage User	9%	20%	16%	39%	18%

Travel Agent Use

Travel agents played a major role in trip planning for VPs to Alaska. More than seven of ten VPs utilized a travel agent. VPs to the Southeast made the most use of travel agents and Southwest visitors the least. Nearly 70% of VPs to Southcentral, the Interior, and Denali utilized a travel agent for their Alaska vacation.

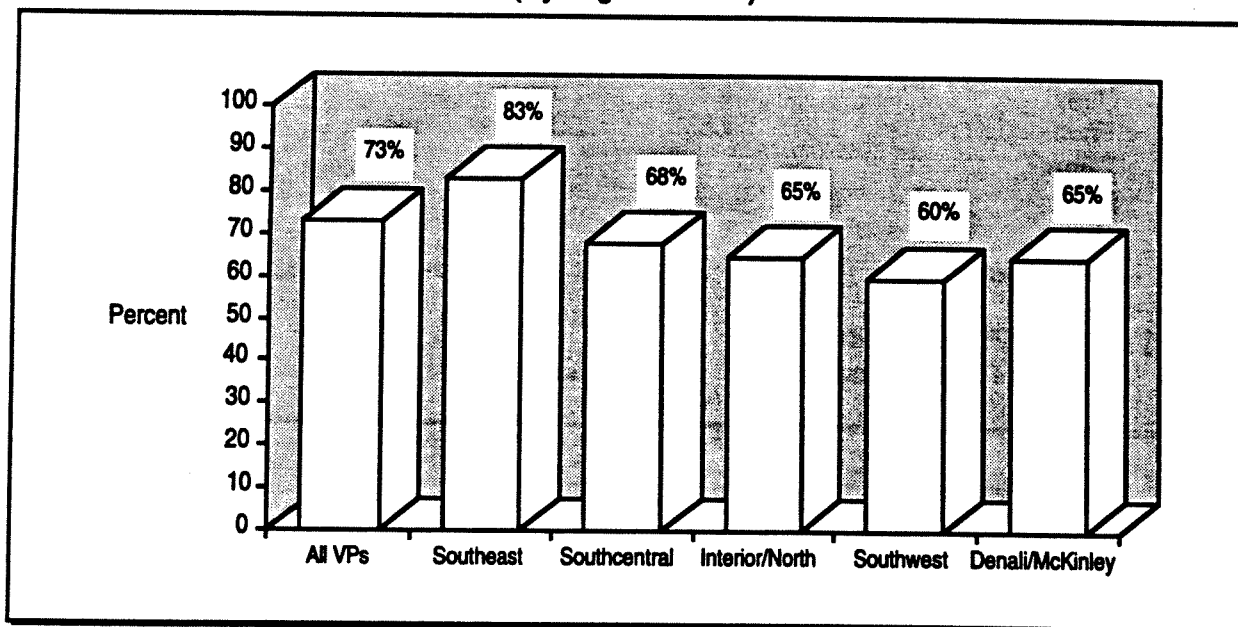
Travel agents provided many services to Vacation/Pleasure visitors. The majority of Southeast VPs used travel agents to book a cruise or tour (66%) or to provide brochures (60%). Large portions of VPs to the Interior, Denali, and Southcentral used travel agents to perform these same functions. Many VPs to these regions were on a package trip. Travel agents play a vital role in planning and booking package trips to Alaska.

Southwest visitors, on the other hand, were primarily Independent visitors and used these travel agent functions the least.

Travel agents also recommended transportation to many VPs to all of Alaska's regions. Southwest visitors made the most use of this travel agent function. They also were the most likely to have a travel agent book independent lodging or transportation for their trip (27%). Twenty percent of Southcentral VPs also had a travel agent book independent lodging or transportation for them.

Graph IV-F

**Travel Agent Use
Vacation/Pleasure Visitors - Summer 1993
(By Region Visited)**



Other services provided by travel agents utilized by visitors to all regions included recommending a particular travel company, recommending a specific place of interest and recommending Alaska as a vacation destination.

Table IV-Z

**Travel Agent Functions
By Region Visited
Vacation/Pleasure Visitors - Summer 1993
(Percent of Each Region's V/P Visitors)**

	South- east	South- central	Interior/ North	South- west	Denali/ McKinley
1. Booked Cruise or Package Tour	66%	43%	46%	12%	45%
2. Provided Brochures	60	44	46	10	48
3. Recommended Transportation or Trip Type	25	20	19	28	18
4. Booked Independent Lodging/Transportation	18	20	17	27	17
5. Recommended Travel Company	20	16	20	16	19
6. Recommended Specific Place of Interest	15	12	13	8	14
7. Recommended Alaska	13	10	12	14	12
8. Recommended Lodging	8	9	10	13	10
9. Other	1	1	1	<1	<1

Vacation/Pleasure Visitor Demographics

Education

VPs to all of Alaska's regions were well educated. About half from all regions had completed college courses. Visitors to Southcentral were the most highly educated with three of ten attending or completing graduate school. Southwest visitors had the next largest portion attending or completing graduate school.

Household Income

VP average household income levels were substantial in Summer 1993. More than one-quarter of VPs to Southeast, Southcentral, and Denali/McKinley had household average earnings exceeding \$75,000. Visitors to Southeast posted the highest average income (\$60,200) of visitors to all regions. Southwest VPs averaged the least (\$53,100).

Visitor Age

Vacation/Pleasure visitors to Southeast had the highest average age (56 Years), probably related to the high number of Package visitors to this region, who were on average older than other visitors. Southwest VPs had the lowest age (48 Years). The majority of Southwest visitors fell between the 35-54 year old category. The majority of visitors to Alaska's other regions fell between the 55-64 year old category.

Visitor Gender

Gender composition between Alaska's regions varies somewhat. The greatest disparity between the female/male ratio was in Southwest where the bulk were male (71%). This could be attributed to the large number of sport fishers traveling to remote lodges. All other regions displayed similar male to female ratios with the number of females exceeding the number of males. Southcentral was the exception with a nearly equal number of males and females.

Visitor Employment

Visitors to Southwest were more likely to be employed than visitors to any other region. Very few were in the "other" category which included those not in the labor force. One-half of Southeast VPs were retired. Interior/North also had a high ratio of retired visitors. On the other hand nearly one-half of Southcentral visitors were employed. Visitors to Denali/McKinley were evenly divided between employed and retired.

Visitor Origin

The Western United States was an important source of VPs to all regions, particularly the Southwest. The South produced 23% of the visitors traveling to all regions except the Interior. Another important domestic source of VPs for all regions was the Midwest which produced 22% of visitors to the Interior. Southeast also received 11% of its visitors from Canada and an additional 7% from Overseas. The Interior, Denali, and Southcentral regions also drew at least 10% of their VPs from Overseas attracting the greatest portions from Germany/Switzerland/Austria and Australia/New Zealand.

Table IV-AA

**Demographics
By Region Visited
Vacation/Pleasure Visitors - Summer 1993
(Percent of Each Region's V/P Visitors)**

	South- east	South- central	Interior/ North	South- west	Denali/ McKinley
Visitor Education					
Not High School Graduates	5 %	5 %	5 %	8 %	5 %
High School Graduates	21	21	24	19	22
1 - 3 Years College	23	22	23	24	21
College Graduate	24	23	21	20	24
Attended or Completed Graduate School	27	30	27	28	27
Visitor Household Income - Average	\$60,200	\$59,700	\$56,500	\$53,100	\$58,600
Under \$25,000	8 %	9 %	9 %	10 %	8 %
\$25,000 - \$34,999	16	16	21	11	18
\$35,000 - \$49,999	24	23	24	40	26
\$50,000 - \$74,999	24	24	22	23	21
\$75,000 - \$99,999	16	16	14	8	14
\$100,000 and Over	12	12	10	8	12
Visitor Age - Average	56	52	54	48	53
Under 18 Years	4	4	4	4	5
18 - 24 Years	2	3	3	<1	3
25 - 34 Years	5	10	9	14	10
35 - 44 Years	9	12	8	21	8
45 - 54 Years	16	17	15	24	17
55 - 64 Years	27	24	29	9	26
65 - 74 Years	29	24	27	18	26
75+ Years	8	7	7	9	6
Visitor Gender					
Male	46 %	51 %	46 %	71 %	47 %
Female	54	49	54	29	53
Visitor Employment					
Employed	40 %	49 %	43 %	64 %	45 %
Retired	50	42	48	29	45
Other	9	9	9	7	10
Visitor Origin					
West	29 %	31 %	26 %	42 %	27 %
California	12	13	9	19	10
Washington	5	5	4	16	5
Midwest	16	17	22	16	19
South	23	23	21	23	23
East	15	15	14	7	16
Canada	11	5	6	6	4
Overseas	7	10	11	8	11
Germany/Switzerland/Austria	3	4	5	7	4
Great Britain	2	2	1	-	2
Japan	<1	1	1	<1	1
Australia/New Zealand	2	3	4	-	3



Chapter V: Selected Summary Profiles

Trip Purpose Profiles

Mode Use Profiles

Origin Profiles



Selected Summary Profiles

Trip Purpose Profiles

- Vacation/Pleasure (VP) visitors were the largest trip purpose group, comprising 75% of the total market. Business Only visitors were the second largest group at 10% of the market, closely followed by those Visiting Friends and Relatives (VFRs) who were 9%. Business and Pleasure (BP) visitors were 5% of the market.
- The overall trip satisfaction ratings were very positive for all trip purpose groups, with those Visiting Friends/Relatives giving Alaska a high overall average of 6.3. VPs awarded a high average of 6.2, followed by BPs with an overall rating of 5.8. Business Only visitors gave a lower average rating of 5.3.
- The friendliness/helpfulness of the people of Alaska and sightseeing/activities were given the highest value for the money ratings by all trip purpose groups. Accommodations and restaurants were rated the lowest by all trip purpose groups.
- Three out of five VFRs plan to visit Alaska for vacation again within the next five years. More than one-third of all Business and Pleasure visitors plan to vacation in Alaska again, as well as more than one-quarter of all VPs.
- Almost seven out of ten VFRs said they were very likely to recommend Alaska as a vacation destination. Three out of five Vacation/Pleasure visitors also felt they would recommend Alaska to family and friends.
- Domestic Air was the most used transportation mode for all trip purpose groups. Vacation/Pleasure visitors used both Domestic Air and Cruise Ship heavily.
- VFRs stayed the longest, 14.3 nights, while Business Only visitors stayed the shortest length of time, 8.4 nights.
- VPs stayed the longest aboard cruise ships and in RV/campgrounds. VFRs stayed the longest in private homes, as did Business and Pleasure visitors. Business Only visitors stayed the longest in hotel/motels.
- Vacation/Pleasure visitors traveled in the largest parties of 2.2 people on the average. Business Only visitors traveled in the smallest parties of 1.4 persons on the average.
- VPs traveled on a packaged tour more often than any other trip purpose group. VFRs were primarily Independent travelers with one-fifth purchasing sightseeing tours while in the state. One-fifth of BPs traveled on packaged tours, and another one-fifth were Independents who purchased sightseeing tours while in state. Business Only visitors were Independents.

- Southeast Alaska received more VPs than any other trip purpose group. On the other hand, Southcentral hosted not only a large portion of VPs, but the majority of every other trip purpose group. More than one-fifth of VFRs and BPs visited the Interior/North, along with approximately one-third of VPs and Business Only visitors. One-fifth of VFRs and BPs went to Denali/McKinley, along with 43% of Vacation/Pleasure visitors.
- Anchorage saw the largest proportion of all trip purpose groups. Juneau hosts three out of five VPs, but considerably less from other trip purpose groups. Most visited communities by VFRs were Anchorage, Palmer and Denali/McKinley. The top three for BPs were Anchorage, Denali/McKinley, and Seward; for Business Only visitors the top communities were Anchorage, Fairbanks and Palmer tied with Denali/McKinley for third.
- The most visited attraction for VPs was the Inside Passage, while Portage Glacier was the most visited attraction for all other trip purpose groups.
- Vacation/Pleasure visitors made the decision to come to Alaska, on the average, well before other trip purpose groups. Business Only visitors had the shortest decision making timeline and travel arrangement time of any other group.
- Travel agents were used by VPs more than any other trip purpose group, providing them with a number of services. VFRs used travel agents primarily for booking independent reservations, as did BPs and Business Only visitors.
- The majority of VPs decided to come to Alaska during Summer 1993 for personal reasons.
- VPs and BPs were the most well-traveled trip purpose group; VFRs the least. Past popular destinations for VPs included Europe, Canada, and the Caribbean; for VFRs, California, Europe, and Florida. BPs' travel histories included California, Europe, and Arizona, while Business Only travelers spent time in Florida, California, and Hawaii.
- Alaska was the most often mentioned as the next probable vacation destination, overall and for those Visiting Friends and Relatives. VPs said they were most likely to go to Europe on their next vacation, while BPs mentioned Hawaii most often. Business Only visitors stated they thought Hawaii would be their next probable vacation destination.
- Average household income was highest among Business Only and BPs, and lowest for VFRs. VPs were the oldest Alaska visitors, averaging 52 years of age, while Business Only visitors were the youngest averaging 38 years. All trip purpose groups were well educated with an average of one-half of all visitors having a college degree. Most visitors were employed, although two out of five VPs were retired.
- The West accounts for most visitors in all trip purpose groups, particularly business-related visitors. The Midwest and the South are important sources of pleasure-oriented visitors (VPs and VFRs).

Table V-A

Trip Purpose Profile Summary All Visitors - Summer 1993

	Total	Vacation/ Pleasure	Visiting Friends/ Relatives	Business and Pleasure	Business Only
Market Significance					
% of Total Visitors	100 %	75 %	9 %	5 %	10 %
Visitor Opinions (1 - 7 Scale)					
Overall Trip Satisfaction Rating	6.1	6.2	6.3	5.8	5.3
Value for the Money Ratings of:					
Accommodations	5.1	5.2	5.1	4.7	4.4
Transportation to Alaska	5.4	5.4	5.2	5.4	5.1
Transportation from Alaska	5.3	5.4	5.2	5.4	5.1
Transportation within Alaska	5.3	5.4	5.0	5.0	4.7
Sightseeing/Attractions	5.8	5.9	6.0	5.6	5.6
Activities	5.4	5.5	5.4	5.3	5.0
Restaurants	4.9	5.1	4.5	4.8	4.4
Friendliness/Helpfulness	6.1	6.2	6.0	5.9	5.6
Overall	5.3	5.4	5.2	5.1	4.7
Repeat Visits in Next 5 Years (% Very Likely)	31 %	28 %	60 %	39 %	21 %
Will Recommend Alaska for Vacation (% Very Likely)	57 %	61 %	68 %	43 %	31 %
Travel Patterns					
Entry Mode					
Domestic Air	53 %	40 %	92 %	80 %	98 %
Cruise Ship	30	39	-	5	-
Highway ¹	12	15	3	8	1
Ferry	3	4	4	2	<1
International Air	2 %	1 %	1 %	4 %	2 %
Exit Mode					
Domestic Air	54 %	42 %	92 %	80 %	97 %
Cruise Ship	27	36	-	8	-
Highway	12	15	4	8	1
Ferry	4	5	3	1	-
International Air	2 %	2 %	1 %	4 %	2 %
Mode Use					
Domestic Air	65 %	56 %	95 %	82 %	98 %
Cruise Ship	38	50	-	8	-
Highway	15	18	5	9	1
Ferry	6	7	5	2	<1
International Air	2 %	2 %	1 %	4 %	3 %
Length of Stay (Average # of Nights)	9.8	9.5	14.3	10.1	8.4

¹ Highway mode includes personal vehicle only. Not included are motorcoaches and trucks.

Trip Purpose Profile Summary All Visitors - Summer 1993

	Total	Vacation/ Pleasure	Visiting Friends/ Relatives	Business and Pleasure	Business Only
# of Nights in Lodging Types					
Hotel/Motel	2.0	1.7	1.1	3.3	4.1
Resort/Lodge	0.4	0.5	0.2	0.3	0.1
Bed and Breakfast	0.3	0.3	0.7	0.2	0.4
Private Home	2.1	1.1	11.2	4.8	0.8
RV/Campground	1.8	2.3	0.4	0.3	-
Cruise Ship	1.8	2.3	-	0.4	-
Ferry	0.1	0.2	0.1	0.3	-
Wilderness	0.6	0.7	0.4	0.2	0.4
Average Party Size	2.1	2.2	1.9	1.7	1.4
Travel Type					
Package	45 %	57 %	1 %	20 %	7 %
Independent	41	29	78	61	93
Inde-Package ²	14 %	15 %	21 %	20 %	- %
Places Visited					
Regions Visited					
Southeast	60 %	73 %	20 %	29 %	15 %
Southcentral	68	65	80	73	80
Interior/North	35	39	22	22	30
Southwest	6	4	5	6	19
Denali/McKinley	36 %	43 %	23 %	20 %	7 %
Top 10 Communities Visited					
1. Anchorage	65 %	61 %	79 %	72 %	79 %
2. Juneau	49	61	12	20	10
3. Ketchikan	47	58	10	12	10
4. Skagway	38	49	4	9	1
5. Denali/McKinley	36	36	40	45	14
6. Glacier Bay	32	41	3	11	-
7. Fairbanks	31	35	19	14	20
8. Seward	30	33	33	25	5
9. Sitka	28	35	6	12	5
10. Palmer	20 %	18 %	51 %	22 %	14 %
Top 10 Attractions Visited					
1. Inside Passage	46 %	59 %	4 %	6 %	<1 %
2. Portage Glacier	44	42	55	48	55
3. Mendenhall Glacier	40	49	10	18	8
4. Ketchikan Totems	40	50	8	10	10
5. Denali/McKinley	36	43	23	20	7
6. Skagway's Historic Gold Rush District	35	45	4	13	<1
7. Glacier Bay	31	39	3	10	-
8. Anchorage Museum of History & Art	26	27	29	14	19
9. Transalaska Pipeline	24	27	13	7	17
10. Sitka's Russian Church & Dancers	22 %	29 %	3 %	10 %	- %

² Inde-Package visitors are Independents who purchased sightseeing tours during their trip.

Trip Purpose Profile Summary All Visitors - Summer 1993

	Total	Vacation/ Pleasure	Visiting Friends/ Relatives	Business and Pleasure	Business Only
Travel Planning - Alaska Trip					
% Considered Other Destinations	27 %	29 %	30 %	23 %	11 %
Alaska as Destination - Timing Decision (Average # of Months Before Trip)	7.2	7.8	6.5	4.7	3.2
Travel Arrangements Made (Average # of Months Before Trip)	4.4	5.0	2.9	2.6	1.4
Travel Agent Role					
Provided Brochures	39 %	49 %	8 %	16 %	5 %
Booked Tour/Cruise	38	49	<1	4	-
Booked Independent Reservations	23	19	37	50	29
Recommended Mode/Type of Trip	18	21	6	22	10
Recommended Travel Company	13	16	3	11	2
Recommended Place of Interest	10	13	3	4	2
Recommended Alaska	9	10	4	7	2
Recommended Lodging	7	7	1	12	10
Didn't Use Travel Agent	31 %	27 %	46 %	32 %	53 %
Reason for Alaska Trip in 1993					
1. Personal Reasons	43 %	54 %	5 %	19 %	2 %
2. Visit Friends/Relatives	14	7	82	8	2
3. Business	14	1	<1	55	95
4. Attractions/Appeal of Alaska	13	16	6	8	1
5. Recommended by Others	6	8	4	-	-
6. Price/Discount Considerations	4	5	1	3	-
7. Advertising/Promotion	2	3	-	3	-
8. Visit All 50 States	<1	<1	-	-	-
9. Weather	<1	<1	-	-	-
10. Other	4 %	5 %	2 %	4 %	- %
Travel Planning - General					
Outside Continental U.S. Vacations (Average # Last 5 Yrs. Excluding AK Trip)	2.8	2.8	2.3	3.0	3.1
2,000 Mile Plus Vacation (Average # Last 5 Yrs. Excluding AK Trip)	3.3	3.2	3.0	4.2	3.2
Past Vacation Destinations					
1. Europe	32 %	32 %	28 %	31 %	28 %
2. California	25	22	31	37	36
3. Florida	24	22	26	20	41
4. Canada	21	24	8	24	5
5. Caribbean	21	23	5	13	23
6. Hawaii	20	19	9	23	36
7. Mexico	17	18	15	14	14
8. Arizona	11	10	15	27	7
9. Asia	9	8	4	15	12
10. Alaska	6 %	7 %	7 %	4 %	6 %

Trip Purpose Profile Summary All Visitors - Summer 1993

Next Probable Vacation Destination	Total	Vacation/ Pleasure	Visiting Friends/ Relatives	Business and Pleasure	Business Only
1. Alaska	14 %	11 %	36 %	10 %	12 %
2. Europe	13	16	3	8	8
3. Hawaii	8	5	5	20	23
4. Caribbean	7	7	8	2	7
5. Florida	7	7	2	4	10
6. Canada	6	8	2	-	1
7. California	4	4	13	2	4
8. Mexico	4	4	2	3	4
9. Australia/South Pacific	4	5	1	3	7
10. Arizona	2 %	2 %	1 %	6 %	1 %

Demographics

Total Household Income/Earnings Average (In Thousands)	\$60.5	\$59.2	\$49.9	\$72.4	\$72.4
Under \$35,000	25 %	26 %	44 %	10 %	11 %
\$35,000-\$50,000	20	22	14	19	14
Over \$50,000	54 %	52 %	42 %	71 %	74 %
Average Age	50	52	43	44	38
Gender					
Male	53 %	50 %	46 %	66 %	87 %
Female	47 %	50 %	54 %	34 %	13 %
Education					
High School or Less	24 %	26 %	28 %	18 %	9 %
Some College	24	23	29	24	26
College Degree or More	52 %	51 %	43 %	58 %	65 %
Employment Status					
Employed	52 %	47 %	48 %	80 %	95 %
Retired	38	43	32	8	<1
Other	10 %	10 %	19 %	12 %	4 %
Origin					
U.S. Total	85 %	83 %	96 %	87 %	93 %
West	37	31	48	67	57
Midwest	15	16	19	4	1
South	21	23	18	12	18
East	12	13	11	4	8
Canada	8	9	1	5	3
Overseas	7	8	3	6	4
G/S/A*	2	3	-	-	-
Great Britain	1	2	-	<1	-
Japan	1	1	<1	1	3
Australia/New Zealand	2 %	2 %	- %	3 %	- %

*Germany/Switzerland/Austria

Mode User Profiles

- Almost two-thirds (65%) of all visitors arrived or departed Alaska by Domestic Air, the largest mode user group. Nearly two of five visitors used Cruise Ships, 14% used the Highway, 6% the Highway and 2% used International Air.
- All mode user groups were extremely pleased with their overall trip, with Cruise Ship and Ferry users averaging the highest ratings of 6.3.
- Friendliness/helpfulness and sightseeing/attractions were awarded very positive value for the money ratings by all mode user groups.
- One-third or more Domestic Air and Highway users indicated their intention to return to Alaska within five years. One-quarter or more of Ferry and International Air users would like to visit again. More than one-half of all mode user groups, except International Air, plan to recommend Alaska as a vacation destination. More than two out of five International Air users plan to recommend.
- Travel patterns by mode user groups illustrates the importance of all transportation modes to the Alaska visitor market. Many visitors utilized more than one transportation mode.
- Ferry users had the longest average length of stay (16 nights), followed by Highway (14.7 nights), International Air (14.0 nights), and Domestic Air (10.3 nights). Cruise Ship users had the shortest length of stay, averaging almost seven nights.
- Domestic Air users averaged more nights in private homes than any other user group, followed by nights in hotel/motels. International Air users spent more nights in hotel/motels, on average, followed by wilderness locations. Highway and Ferry users stayed in RV/Campgrounds more nights, on average, than other lodging types.
- The smallest average party size was found on Domestic Air (2.0); Highway, Ferry, and International Air users had the largest average party size (2.3).
- Nearly all Cruise Ship users traveled on packaged tours, as well as nearly four out of ten Domestic and International Air users. More than one-half of Ferry users purchased sightseeing tours while instate, just as 45% of Highway users did.
- All Cruise Ship and Ferry users visit Southeast, while most Highway users, but fewer Domestic Air and International Air users see this region. Southcentral is visited by the majority of every mode user group. The Interior/North and Denali/McKinley are seen by most Highway and Ferry users. Southwest captured mostly users of International and Domestic Air.

- Anchorage is the most visited community for Domestic Air and International Air users. Juneau and Ketchikan are the most visited communities for Cruise Ship users. Ferry users visited Ketchikan the most, while Highway users visited Denali/McKinley the most.
- The Inside Passage is the most visited attraction for Cruise Ship and Ferry users. Denali/McKinley is the most visited attraction for Highway and International Air users, while Portage Glacier is the most visited for Domestic Air users.
- Highway and Ferry users decided the visit Alaska between nine and ten months in advance, on the average. Cruise Ship and Ferry users made their travel arrangements averaging between five and six months in advance. Domestic Air users had the shortest average timing decision time (6.7 months) and shortest average for travel arrangements time (4.0 months).
- Travel agents were most widely used by Cruise Ship users and least used by Highway users.
- Personal reasons, such as being able to travel with family/friends or long time desire, were the primary reasons all mode user groups cited for their trip.
- International Air users were the most well-traveled of the user groups, averaging nearly five vacations of 2,000 miles or more in the past five years. Europe is the top past vacation destination for Domestic and International air users as well as Cruise Ship users. Canada was the most visited past vacation destination for Highway and Ferry users.
- Domestic Air and Highway users favored Alaska for their next probable vacation destination. Europe was most favored by Cruise Ship users, Australia/South Pacific by International Air users, and Canada was most favored by Ferry users.
- International Air users had the highest average household income, followed by Cruise Ship and Domestic Air users. Ferry users had the lowest average household income. More than one-half of all Domestic Air, Cruise Ship and International Air users make more than \$50,000 annually.
- All mode user groups were highly educated, with nearly one-half of each group having attained at least a college degree.
- The majority of Domestic Air and Ferry users were from the West. Cruise Ship users came from the South and the West, while Highway users came from the West and Canada.

Table V-B

Mode User Profile Summary All Visitors - Summer 1993

	Domestic Air	Cruise Ship	Highway	Ferry	Int'l Air
Market Significance					
% of Total Visitors	65 %	38 %	14 %	6 %	2 %
Visitor Opinions (1 - 7 Scale)					
Overall Trip Satisfaction Rating	6.0	6.3	6.0	6.3	5.9
Value for the Money Ratings of:					
Accommodations	5.0	5.6	4.6	4.7	4.9
Transportation to Alaska	5.4	5.7	4.4	5.3	4.8
Transportation from Alaska	5.4	5.7	4.4	5.1	4.8
Transportation within Alaska	5.2	5.8	4.8	5.1	4.9
Sightseeing/Attractions	5.8	5.8	5.8	5.9	5.5
Activities	5.4	5.6	5.3	5.2	4.9
Restaurants	4.8	5.4	4.7	4.8	4.6
Friendliness/Helpfulness	6.0	6.3	6.0	6.0	6.1
Overall	5.2	5.8	5.0	5.2	5.0
Repeat Visits in Next 5 Years (% Very Likely)	33 %	15 %	37 %	26 %	29 %
Will Recommend Alaska for Vacation (% Very Likely)	55 %	62 %	60 %	62 %	45 %
Travel Patterns					
Entry Mode					
Domestic Air	82 %	23 %	2 %	19 %	22 %
Cruise Ship	16	77	1	-	5
Highway ¹	1	-	86	24	5
Ferry	1	-	11	57	1
International Air	<1 %	<1 %	- %	- %	68 %
Exit Mode					
Domestic Air	84 %	28 %	3 %	12 %	12 %
Cruise Ship	13	72	-	-	3
Highway	1	<1	86	26	-
Ferry	2	-	10	61	-
International Air	1 %	<1 %	1 %	<1 %	85 %
Length of Stay (Average # of Nights)	10.3	6.8	14.7	16.0	14.0

¹ Highway mode includes personal vehicle only. Not included are motorcoaches and trucks.

Mode User Profile Summary All Visitors - Summer 1993

	Domestic				Int'l
	Air	Cruise Ship	Highway	Ferry	Air
# of Nights in Lodging Types					
Hotel/Motel	2.7	1.4	1.3	2.6	4.5
Resort/Lodge	0.6	0.4	0.1	0.4	0.8
Bed and Breakfast	0.4	—	0.2	0.8	0.7
Private Home	2.9	0.1	1.6	1.8	1.8
RV/Campground	0.5	0.1	9.6	7.3	2.1
Cruise Ship	1.4	4.5	—	—	0.6
Ferry	0.1	—	0.4	1.9	—
Wilderness	0.7	—	0.6	0.5	3.0
Average Party Size	2.0	2.1	2.3	2.3	2.3
Travel Type					
Package	39 %	97 %	3 %	13 %	37 %
Independent	51	3	52	30	59
Inde-Package ²	10 %	<1 %	45 %	57 %	5 %
Places Visited					
Regions Visited					
Southeast	46 %	100 %	70 %	100 %	30 %
Southcentral	84	53	75	70	90
Interior/North	37	29	76	65	34
Southwest	8	1	2	2	14
Denali/McKinley	41 %	33 %	62 %	65 %	57 %
Top 10 Communities Visited					
1. Anchorage	82 %	49 %	73 %	68 %	89 %
2. Juneau	39	97	28	75	21
3. Ketchikan	36	94	22	88	15
4. Skagway	30	70	56	70	17
5. Denali/McKinley	35	6	83	59	48
6. Glacier Bay	22	69	12	27	14
7. Fairbanks	33	29	62	60	31
8. Seward	32	28	48	34	33
9. Sitka	21	57	14	55	11
10. Palmer	21	3	47	39	27
Top 10 Attractions Visited					
1. Inside Passage	34 %	100 %	29 %	79 %	18 %
2. Portage Glacier	54	25	52	51	49
3. Mendenhall Glacier	33	78	21	45	19
4. Ketchikan Totems	30	83	13	46	13
5. Denali/McKinley	41	33	62	65	57
6. Skagway's Historic Gold Rush District	27	62	55	63	20
7. Glacier Bay	20	62	12	26	21
8. Anchorage Museum of History & Art	32	25	27	29	35
9. Transalaska Pipeline	26	24	45	47	24
10. Sitka's Russian Church & Dancers	17 %	47 %	9 %	30 %	14 %

² Inde-Package visitors are Independents who purchased sightseeing tours during their trip.

Table V-B Continued

Mode User Profile Summary All Visitors - Summer 1993

	Domestic Air	Cruise Ship	Highway	Ferry	Int'l Air
Travel Planning - Alaska Trip					
% Considered Other Destinations	27 %	29 %	24 %	32 %	30 %
Alaska as Destination - Timing Decision (Average # of Months Before Trip)	6.7	7.4	9.2	9.6	7.4
Travel Arrangements Made (Average # of Months Before Trip)	4.0	5.5	4.6	5.3	3.9
Travel Agent Role					
Provided Brochures	34 %	76 %	13 %	26 %	28 %
Booked Tour/Cruise	32	89	6	13	17
Booked Independent Reservations	29	15	9	26	19
Recommended Mode/Type of Trip	17	33	4	7	19
Recommended Travel Company	13	27	2	2	7
Recommended Place of Interest	9	20	4	5	5
Recommended Alaska	8	16	3	7	7
Recommended Lodging	9	10	2	5	9
Didn't Use Travel Agent	30 %	3 %	73 %	48 %	42 %
Reason for Alaska Trip in 1993					
1. Personal Reasons	34 %	66 %	56 %	48 %	42 %
2. Business	20	1	5	3	13
3. Visit Friends/Relatives	19	1	8	1	5
4. Attractions/Appeal of Alaska	13	7	19	21	23
5. Recommended by Others	5	8	5	4	10
6. Price/Discount Considerations	4	8	<1	3	1
7. Advertising/Promotion	2	4	1	1	2
8. Visit All 50 States	<1	<1	-	<1	-
9. Weather	<1	<1	-	-	-
10. Other	4 %	5 %	6 %	7 %	5 %
Travel Planning - General					
Outside Continental U.S. Vacations (Average # Last 5 Yrs. Excluding AK Trip)	2.7	2.9	2.5	2.5	5.0
2,000 Mile Plus Vacation (Average # Last 5 Yrs. Excluding AK Trip)	3.3	3.2	3.1	3.3	4.5
Past Vacation Destinations					
1. Europe	31 %	37 %	27 %	28 %	61 %
2. California	28	17	22	19	23
3. Florida	26	22	20	20	7
4. Canada	15	24	41	42	25
5. Caribbean	20	34	8	10	3
6. Hawaii	22	17	13	17	9
7. Mexico	17	19	14	15	14
8. Arizona	12	6	18	21	1
9. Asia	9	7	5	6	41
10. Alaska	7 %	4 %	9 %	5 %	3 %

Mode User Profile Summary All Visitors - Summer 1993

	Domestic Air	Cruise Ship	Highway	Ferry	Int'l Air
Next Probable Vacation Destination					
1. Alaska	15 %	4 %	20 %	8 %	21 %
2. Europe	12	21	11	15	23
3. Hawaii	10	6	3	4	2
4. Caribbean	7	9	2	1	4
5. Florida	7	8	2	4	1
6. Canada	3	8	17	17	1
7. California	5	3	5	4	-
8. Mexico	4	2	4	6	-
9. Australia/South Pacific	4	6	3	6	30
10. Arizona	3 %	1 %	2 %	3 %	• %
Demographics					
Total Household Income/Earnings					
Average (In Thousands)	\$61.1	\$61.3	\$54.2	\$52.5	\$68.3
Under \$35,000	24 %	22 %	34 %	31 %	24 %
\$35,000-\$50,000	20	24	20	28	13
Over \$50,000	56 %	54 %	45 %	42 %	64 %
Average Age	48	59	48	50	40
Gender					
Male	55 %	42 %	54 %	51 %	64 %
Female	45 %	58 %	46 %	49 %	35 %
Education					
High School or Less	21 %	26 %	32 %	26 %	26 %
Some College	26	24	21	26	20
College Degree or More	53 %	50 %	48 %	48 %	55 %
Employment Status					
Employed	61 %	39 %	35 %	42 %	68 %
Retired	31	55	47	43	13
Other	9 %	6 %	18 %	15 %	19 %
Origin					
U.S. Total	93 %	85 %	66 %	76 %	11 %
West	44	26	28	32	2
Midwest	15	15	19	19	1
South	21	27	14	13	7
East	14	17	5	11	2
Canada	2	9	25	12	7
Overseas	5	4	9	13	75
G/S/A*	1	1	8	7	23
Great Britain	1	3	<1	1	7
Japan	1	-	<1	-	24
Australia/New Zealand	2 %	2 %	8 %	3 %	- %

*Germany/Switzerland/Austria

Origin Profiles

- Alaska's largest visitor market originated from the United States comprising 86% of all visitors to Alaska. Most U.S. visitors came from the Western United States, with 14% arriving from California alone. The Southern states provided the second largest group followed by the Midwest and the East. Canada provided 8% of the visitor market. Overseas visitors contributed 7% of the total market with most coming from Europe.
- Overall trip satisfaction ratings were high for visitors from all points of origin. The highest overall rating (6.5) was rendered by visitors from Great Britain and the lowest rating, though well above average, (5.7) given by visitors from Washington State.
- Value for money ratings overall were ranked very good among visitors from all locations. The highest value for money ratings were attributed to the friendliness/helpfulness of Alaskans and to sightseeing and attractions.
- Nearly half of Alaska's visitors from Washington indicated they would repeat a visit to Alaska in the next five years. More than one-third of Japanese and German/Swiss/Austrian visitors indicated they would probably return. Visitors from Great Britain indicated the lowest interest (10%) of returning.
- Most visitors indicated they would recommend Alaska as a vacation destination to their family and friends including nearly six of ten U.S. visitors. More than one-half of Canadian and Overseas visitors indicated they would endorse Alaska for a vacation.
- U. S. visitors primarily used Domestic Air followed by Cruise Ship. Canadian visitors primarily used the Highway and then Cruise Ship. The dominant transportation mode for Overseas visitors were Domestic Air, Cruise Ship, and International Air. Japanese visitors primarily utilized International Air.
- Visitors from Overseas averaged greater lengths of stay in Alaska (12.2 nights), with German/Swiss/Austrians averaging the longest period (13.3 nights). Canadians averaged the shortest period in Alaska. The U.S. average length of stay was ten nights with Midwest visitors staying the longest (11.1 nights).
- Overall visitors from the U.S. spent the greatest amount of time in private homes (2.4 nights). Visitors from the South and Eastern U.S. stayed the longest aboard cruise ships as did Canadian visitors. Overseas visitors utilized RV/campgrounds the longest, particularly the German/Swiss/Austrians. Japanese and Australia/New Zealand visitors spent the greatest amount of time in hotel/motels.
- Visitors from Germany/Switzerland/Austria traveled in the largest parties (2.7). Australia/New Zealand visitors had the smallest party size, averaging 1.8 people.
- Many U.S. visitors traveled on a package tour, particularly those from the East, South and Midwest. Most Canadian and British visitors were Package visitors. Australia/New Zealand, Japanese, and German/Swiss/Austrian visitors traveled mostly as Independents.

- Southcentral hosted the highest proportion of visitors from all points of origin except Canada and Great Britain. On the other hand, Southeast received the highest portion of visitors from these two points of origin. The Interior/North attracted seven of ten Australia/New Zealand visitors and more than half of the German/Swiss/Austrian contingent. Denali/McKinley hosted 65% of visitors from Germany/Switzerland/Austria and nearly four of ten visitors from the U.S.
- Anchorage hosted the majority of Alaska's visitors except the Canadians and the British who were more likely to travel to Juneau and Ketchikan. Other popular communities visited by U.S. visitors were Skagway and Denali. More than half of Overseas visitors were also attracted to Denali.
- Portage Glacier was the most popular attraction for visitors from the Western U.S., Japan and Germany/Switzerland/Austria. The Inside Passage was visited most by visitors from the Eastern U.S., Canada, Great Britain, and Australia/New Zealand. Denali was popular for Midwesterners.
- Visitors from the Eastern U.S. made the decision to travel to Alaska and their trip arrangements earlier than other U.S. visitors. Overseas visitors decided to visit Alaska nearly nine months in advance and made their trip arrangements five months before the departure date. Japanese visitors averaged the least amount of time to decide or make trip arrangements for their Alaska trip.
- The majority of visitors from all points of origin used a travel agent. Nearly four of ten U.S. visitors obtained brochures or booked a tour or cruise through a travel agent as did the majority of Canadian and Overseas visitors.
- Most visitors traveled to Alaska in 1993 for personal reasons. Alaska's attractions and appeals attracted one-quarter of Overseas visitors in Summer 1993.
- Overseas visitors were well traveled, averaging four trips 2,000 or more miles away from home in the last five years. Primary past travel destinations for Overseas visitors were Canada, Asia, California, and Hawaii. Primary past destinations for U.S. visitors were Europe, Florida, California, the Caribbean, and Hawaii.
- Alaska ranked highest as the most probable vacation destination for most U.S. visitors followed closely by Europe. Most Overseas visitors indicated that Europe would be the next most probable vacation destination. Japanese visitors were more likely to mention Alaska or Hawaii as probable vacation spots.
- Japanese visitors were the most affluent travelers to Alaska with an average annual household income of \$81,600. German/Swiss/Austrian visitors also had higher than average household incomes. Among U.S. visitors, only those from the Midwest had a lower than average household income.
- Alaska's oldest visitors hailed from Australia/New Zealand and the youngest were from Japan. The majority of U.S. visitors were well educated with more than half from the West, South, and East obtaining college degrees. Most Overseas visitors were also very well educated, particularly the Japanese.
- The majority of Alaska's U.S. and Overseas visitors were employed. A higher proportion of British, Southern, and Eastern U. S. visitors were retired.

Table V-C

Origin Profile Summary All Visitors - Summer 1993

	U.S.	West ← Total CA WA →			Mid- west	South	East
Market Significance							
% of Total Visitors	86 %	37 %	14 %	9 %	15 %	21 %	12 %
Visitor Opinions (1 - 7 Scale)							
Overall Trip Satisfaction Rating	6.1	5.9	6.0	5.7	6.2	6.1	6.3
Value for the Money Ratings of:							
Accommodations	5.1	4.9	4.9	4.6	5.1	5.2	5.3
Transportation to Alaska	5.4	5.4	5.5	5.3	5.2	5.4	5.5
Transportation from Alaska	5.4	5.4	5.5	5.3	5.2	5.4	5.5
Transportation within Alaska	5.3	5.2	5.3	4.8	5.2	5.4	5.7
Sightseeing/Attractions	5.9	5.8	5.9	5.7	5.9	5.8	5.9
Activities	5.5	5.5	5.6	5.2	5.3	5.5	5.7
Restaurants	4.9	4.9	5.0	4.6	5.0	4.8	5.2
Friendliness/Helpfulness	6.1	6.0	6.1	5.6	6.1	6.2	6.3
Overall	5.3	5.3	5.3	5.0	5.3	5.4	5.4
Repeat Visits in Next 5 Years							
(% Very Likely)	32 %	40 %	28 %	48 %	28 %	27 %	21 %
Will Recommend Alaska							
for Vacation							
(% Very Likely)	58 %	54 %	56 %	45 %	62 %	61 %	60 %
Travel Patterns							
Entry Mode							
Domestic Air	58 %	68 %	62 %	79 %	51 %	50 %	52 %
Cruise Ship	29	20	29	9	29	40	39
Highway ¹	9	9	6	8	15	7	6
Ferry	3	3	3	4	4	2	2
International Air	<1 %	<1 %	<1 %	- %	<1 %	<1 %	<1 %
Exit Mode							
Domestic Air	60 %	68 %	67 %	74 %	51 %	55 %	57 %
Cruise Ship	27	20	24	16	27	35	33
Highway	9	9	6	9	16	8	6
Ferry	3	3	3	2	5	2	4
International Air	<1 %	- %	- %	- %	- %	1 %	- %
Mode Use							
Domestic Air	71 %	76 %	74 %	84 %	64 %	64 %	75 %
Cruise Ship	38	27	35	19	39	49	54
Highway	11	11	8	10	19	9	6
Ferry	5	5	5	4	8	4	6
International Air	<1 %	<1 %	<1 %	- %	<1 %	1 %	<1 %
Length of Stay							
(Average # of Nights)	10.0	9.9	8.7	8.8	11.1	9.0	10.6

¹ Highway mode includes personal vehicles only. Not included are motorcoaches and trucks.

¹ Highway mode includes personal vehicles only. Not included are motorcoaches and trucks.

Origin Profile Summary

All Visitors - Summer 1993

	Canada	Total Overseas	Germany/ Switzerland/ Austria	Great Britain	Japan	Australia/ New Zealand
Market Significance						
% of Total Visitors	8 %	7 %	2 %	1 %	1 %	2 %
Visitor Opinions (1 - 7 Scale)						
Overall Trip Satisfaction Rating	5.9	6.3	6.4	6.5	5.8	6.4
Value for the Money Ratings of:						
Accommodations	5.2	4.9	4.7	5.5	4.5	4.7
Transportation to Alaska	5.4	4.8	4.7	5.7	4.4	5.1
Transportation from Alaska	5.3	4.8	4.6	5.6	4.5	4.8
Transportation within Alaska	5.4	5.1	5.1	5.6	5.1	5.2
Sightseeing/Attractions	5.7	5.8	5.7	6.4	5.7	5.6
Activities	5.2	5.3	4.8	5.9	5.5	5.1
Restaurants	4.9	4.9	4.5	5.3	4.7	5.2
Friendliness/Helpfulness	6.0	6.2	6.2	6.3	5.8	6.3
Overall	5.3	5.3	5.1	6.0	4.8	5.4
Repeat Visits in Next 5 Years (% Very Likely)	25 %	25 %	35 %	10 %	36 %	15 %
Will Recommend Alaska for Vacation (% Very Likely)	53 %	51 %	57 %	39 %	53 %	51 %
Travel Patterns						
Entry Mode						
Domestic Air	11 %	36 %	15 %	38 %	37 %	62 %
Cruise Ship	41	20	8	60	—	21
Highway ¹	43	17	44	—	3	5
Ferry	4	8	14	3	—	12
International Air	— %	19 %	19 %	— %	60 %	— %
Exit Mode						
Domestic Air	12 %	31 %	6 %	31 %	41 %	61 %
Cruise Ship	38	23	17	56	—	28
Highway	40	18	47	1	3	8
Ferry	7	5	9	2	—	4
International Air	2 %	23 %	22 %	12 %	55 %	— %
Mode Use						
Domestic Air	18 %	50 %	21 %	54 %	41 %	87 %
Cruise Ship	45	32	16	71	—	48
Highway	47	20	50	1	3	8
Ferry	9	11	21	3	—	12
International Air	2 %	25 %	25 %	12 %	60 %	— %
Length of Stay (Average # of Nights)	6.2	12.2	13.3	10.8	11.8	10.4

¹ Highway mode includes personal vehicle only. Not included are motorcoaches and trucks.

Origin Profile Summary All Visitors - Summer 1993

	U.S.	West		Mid-west	South	East
		Total	CA	WA		
# of Nights in Lodging Types						
Hotel/Motel	2.0	2.1	1.7	2.6	1.8	2.3
Resort/Lodge	0.4	0.4	0.6	0.3	0.5	0.5
Bed & Breakfast	0.3	0.2	0.2	0.1	0.7	0.2
Private Home	2.4	2.9	1.8	1.8	3.0	1.6
R/V Car Campground	1.7	1.6	1.5	1.0	2.6	1.4
Cruise Ship	1.8	1.2	1.4	0.9	1.9	2.5
Ferry	0.1	0.1	0.1	0.1	0.2	0.2
Wilderness	0.5	0.7	1.1	0.5	0.2	0.8
Other	0.5	0.7	0.3	1.4	0.4	0.1
Average Party Size	2.1	2.0	2.0	1.9	2.1	2.1
Travel Type						
Package	45 %	33 %	42 %	21 %	52 %	59 %
Independent	41	53	44	65	33	28
Inde-Package ²	14 %	14 %	14 %	14 %	15 %	14 %
Places Visited						
Regions Visited						
Southeast	59 %	50 %	53 %	47 %	61 %	71 %
Southcentral	71	69	69	64	72	77
Interior/North	35	30	27	29	51	39
Southwest	6	8	8	11	4	3
Denali/McKinley	37 %	28 %	31 %	17 %	47 %	47 %
Top 10 Communities Visited						
1. Anchorage	67 %	65 %	67 %	61 %	69 %	74 %
2. Juneau	49	40	44	32	50	62
3. Ketchikan	46	38	45	34	49	57
4. Skagway	37	26	33	15	40	53
5. Denali	37	28	31	17	47	47
6. Glacier Bay	30	21	23	17	33	43
7. Fairbanks	31	25	21	20	46	37
8. Seward	30	26	28	18	37	33
9. Sitka	28	22	17	25	29	37
10. Palmer	21 %	22 %	19 %	17 %	25 %	13 %
Top 10 Attractions Visited						
1. Inside Passage	44 %	34 %	41 %	22 %	46 %	58 %
2. Portage Glacier	46	48	51	44	42	47
3. Mendenhall Glacier	40	32	34	27	41	46
4. Ketchikan Totems	38	30	37	24	41	50
5. Denali/McKinley	36	28	30	16	47	47
6. Skagway's Historic Gold Rush District	33	26	32	14	37	44
7. Glacier Bay	29	21	26	12	30	41
8. Anchorage Museum of History and Art	25	24	21	23	26	34
9. Transalaska Pipeline	24	18	16	14	39	28
10. Sitka's Russian Church and Dancers	18 %	14 %	15 %	19 %	25 %	27 %

² Inde-Package visitors are independents who purchased sightseeing tours during their trip.

Origin Profile Summary

All Visitors - Summer 1993

	Canada	Total Overseas	Germany/ Switzerland/ Austria	Great Britain	Japan	Australia/ New Zealand
# of Nights in Lodging Types						
Hotel/Motel	1.3	2.8	2.2	0.4	5.3	3.9
Resort/Lodge	0.2	0.5	0.6	-	0.9	1.0
Bed & Breakfast	0.1	0.3	0.1	0.5	0.2	0.4
Private Home	0.2	1.1	0.4	-	0.8	-
R/V Car Campground	1.2	2.9	6.9	1.9	1.1	0.2
Cruise Ship	2.1	1.4	0.7	3.1	-	2.3
Ferry	0.2	0.2	0.5	0.1	-	0.3
Wilderness	0.8	1.9	1.6	3.9	3.5	0.2
Other	-	0.4	0.5	0.9	-	0.4
Average Party Size	2.2	2.1	2.7	2.0	1.9	1.8
Travel Type						
Package	50 %	39 %	24 %	86 %	30 %	29 %
Independent	37	49	51	13	58	62
Inde-Package ²	13 %	13 %	24 %	3 %	13 %	8 %
Places Visited						
Regions Visited						
Southeast	86 %	57 %	71 %	74 %	8 %	63 %
Southcentral	34	82	80	54	100	94
Interior/North	25	48	54	24	15	72
Southwest	2	6	9	-	18	-
Denali/McKinley	17 %	50 %	65 %	35 %	42 %	61 %
Top 10 Communities Visited						
1. Anchorage	32 %	80 %	77 %	54 %	100 %	95 %
2. Juneau	60	43	34	74	4	59
3. Ketchikan	57	37	26	74	-	54
4. Skagway	55	41	53	44	1	55
5. Denali	17	51	65	35	42	61
6. Glacier Bay	45	34	33	58	3	45
7. Fairbanks	20	41	61	24	13	61
8. Seward	15	40	48	26	23	58
9. Sitka	38	21	23	38	-	13
10. Palmer	9 %	21 %	36 %	- %	23 %	14 %
Top 10 Attractions Visited						
1. Inside Passage	62 %	45 %	38 %	73 %	- %	63 %
2. Portage Glacier	15	54	52	53	58	51
3. Mendenhall Glacier	39	40	32	63	-	59
4. Ketchikan Totems	52	34	18	73	-	46
5. Denali/McKinley	16	50	65	35	42	60
6. Skagway's Historic Gold Rush District	50	42	53	43	-	57
7. Glacier Bay	42	29	30	55	7	24
8. Anchorage Museum of History and Art	9	38	32	28	28	62
9. Transalaska Pipeline	14	27	41	-	7	49
10. Sitka's Russian Church and Dancers	34 %	16 %	20 %	25 %	- %	8 %

² Inde-Package visitors are independents who purchased sightseeing tours during their trip.

7. Long Time Desire	7	4	6	<1	10	9	7
8. Recommended by Others	6	5	5	2	8	7	4
9. Special Occasion	5	4	3	4	6	6	9
10. Timing Considerations	5 %	4 %	8 %	1 %	8 %	3 %	5 %

Travel Planning - General

Outside Continental U.S. Vacations

(Average # Last 5 Yrs. Excluding AK Trip) 2.5 2.8 3.1 2.7 1.7 2.7 2.4

2,000 Mile Plus Vacation

(Average # Last 5 Yrs. Excluding AK Trip) 3.2 3.5 4.1 3.1 2.3 3.2 3.0

Past Vacation Destination

1. Europe	29 %	27 %	29 %	19 %	20 %	33 %	41 %
2. California	25	26	15	44	27	21	24
3. Florida	27	18	18	25	40	27	36
4. Canada	16	17	20	16	14	21	8
5. Caribbean	23	17	24	12	20	29	34
6. Hawaii	21	26	29	30	16	15	20
7. Mexico	18	21	30	19	11	19	13
8. Arizona	12	12	10	13	18	7	14
9. Asia	7	9	12	5	3	8	5
10. Alaska	7 %	8 %	5 %	9 %	5 %	8 %	3 %

Origin Profile Summary All Visitors - Summer 1993

	Canada	Total Overseas	Germany/ Switzerland/ Austria	Great Britain	Japan	Australia/ New Zealand
Travel Planning - Alaska Trip						
% Considered Other Destinations	24 %	30 %	49 %	10 %	17 %	27 %
Alaska as Destination - Timing Decision (Average # of Months Before Trip)						
	6.6	8.5	9.4	8.6	5.5	9.6
Travel Arrangements Made (Average # of Months Before Trip)						
	3.7	4.6	5.6	5.7	2.3	4.2
Travel Agent Role						
Provided Brochures	41 %	53 %	45 %	79 %	41 %	67 %
Booked Tour/Cruise	44	34	25	58	18	51
Booked Independent Reservations	14	21	13	8	24	52
Recommended Mode/Type of Trip	16	20	15	18	15	29
Recommended Travel Company	10	11	12	8	4	27
Recommended Place of Interest	9	5	9	1	3	5
Recommended Alaska	4	11	22	1	9	11
Recommended Lodging	5	6	2	1	11	15
Didn't Use Travel Agent	31 %	27 %	27 %	14 %	43 %	20 %
Reason for Alaska Trip in 1993						
1. Personal Reasons	55 %	39 %	54 %	15 %	28 %	58 %
2. Business	9	10	1	-	37	11
3. Visit Friends and Relatives	2	4	1	-	4	-
4. Attractions/Appeal of Alaska	20	24	35	23	21	14
5. Natural Attractions	12	19	29	10	16	14
6. Family/Friend Related Reasons	7	4	4	12	7	-
7. Long Time Desire	10	6	11	-	3	8
8. Recommended by Others	5	9	1	24	4	3
9. Special Occasion	11	-	-	-	-	-
10. Timing Considerations	5 %	10 %	7 %	- %	7 %	30 %
Travel Planning - General						
Outside Continental U.S. Vacations (Average # Last 5 Yrs. Excluding AK Trip)						
	3.1	5.5	5.8	6.5	4.7	3.6
2,000 Mile Plus Vacation (Average # Last 5 Yrs. Excluding AK Trip)						
	3.5	4.1	3.9	3.8	4.6	3.3
Past Vacation Destinations						
1. Europe	31 %	63 %	84 %	77 %	23 %	29 %
2. California	31	20	10	16	24	23
3. Florida	16	6	10	9	3	-
4. Canada	54	34	39	37	14	46
5. Caribbean	20	4	7	7	-	-
6. Hawaii	15	13	2	7	44	13
7. Mexico	16	5	6	9	3	3
8. Arizona	11	3	1	-	1	11
9. Asia	9	23	11	35	53	16
10. Alaska	4 %	2 %	3 %	- %	1 %	- %

Origin Profile Summary All Visitors - Summer 1993

	U.S.	← West → Total	CA	WA	Mid- west	South	East
Next Probable Vacation Destination							
1. Alaska	13 %	19 %	15 %	25 %	11 %	7 %	9 %
2. Europe	12	11	12	6	7	14	16
3. Hawaii	9	13	8	21	4	8	2
4. Caribbean	7	2	5	1	11	7	18
5. Florida	7	4	3	3	15	9	7
6. Canada	4	2	<1	3	4	6	8
7. California	4	4	3	5	7	3	5
8. Mexico	3	6	6	8	-	1	1
9. Australia/South Pacific	3	4	5	3	2	5	1
10. Arizona	2 %	3 %	2 %	7 %	1 %	2 %	4 %
Demographics							
Total Household Income/Earnings Average (In Thousands)							
	\$60.9	\$62.4	\$62.6	\$65.6	\$52.2	\$61.9	\$65.7
Under \$35,000	25 %	20 %	17 %	19 %	33 %	26 %	25 %
\$35,000-\$50,000	21	23	24	16	22	18	19
Over \$50,000	54 %	57 %	59 %	64 %	45 %	56 %	57 %
Average Age	51	49	49	47	51	53	52
Gender							
Male	53 %	57 %	58 %	60 %	51 %	50 %	48 %
Female	47 %	43 %	42 %	40 %	49 %	50 %	52 %
Education							
High School or Less	21 %	19 %	11 %	25 %	28 %	22 %	23 %
Some College	25	27	33	28	31	23	16
College Degree	53 %	54 %	56 %	48 %	41 %	55 %	61 %
Employment							
Employed	52 %	59 %	59 %	68 %	50 %	44 %	54 %
Retired	37	30	30	20	42	45	40
Other	10 %	10 %	10 %	11 %	8 %	10 %	6 %

Origin Profile Summary All Visitors - Summer 1993

Next Probable Vacation Destination	Canada	Total Overseas	Germany/ Switzerland/ Austria	Great Britain	Japan	Australia/ New Zealand
1. Alaska	19 %	11 %	15 %	- %	29 %	3 %
2. Europe	12	30	51	26	16	24
3. Hawaii	1	7	1	-	25	17
4. Caribbean	3	3	3	-	-	9
5. Florida	5	<1	1	-	-	-
6. Canada	31	10	16	25	-	-
7. California	5	3	-	-	-	-
8. Mexico	4	4	-	21	-	4
9. Australia/South Pacific	1	19	5	26	14	32
10. Arizona	2 %	- %	- %	- %	- %	- %

Demographics

Total Household Income/Earnings Average (In Thousands)	\$58.7	\$57.9	\$69.9	\$49.8	\$81.6	\$38.8
Under \$35,000	28 %	31 %	15 %	36 %	7 %	52 %
\$35,000-\$50,000	16	18	13	27	14	27
Over \$50,000	55 %	52 %	71 %	38 %	79 %	20 %
Average Age	48	46	41	51	39	57
Gender						
Male	49 %	56 %	58 %	56 %	65 %	41 %
Female	51 %	44 %	42 %	44 %	35 %	59 %
Education						
High School or Less	36 %	35 %	30 %	53 %	11 %	47 %
Some College	21	14	16	-	28	15
College Degree	43 %	51 %	56 %	48 %	60 %	38 %
Employment						
Employed	39 %	57 %	61 %	48 %	56 %	57 %
Retired	43	28	19	52	10	40
Other	18 %	15 %	20 %	- %	35 %	3 %

Appendix

Appendix

Methodology Summary

The Arrival Count (AC) is the method of counting all passengers (visitors and residents) who enter the state. The count is conducted by obtaining passenger counts on highway and cruise ship arrivals, through U.S. Customs records airlines and the State Ferry.

The *Random Arrival Survey (RAS)* then determines whether passengers are residents or non-residents. The ratio of sample composition is used to determine composition for the full passenger count. Since scientific sampling reflects the total population characteristics accurately, a high level of confidence exists in the true composition of all arrival figures. The resulting data in this report can be considered accurate within $\pm 0.4\%$ to $\pm 1.8\%$ at the 95% confidence level.

The *Random Arrival Survey* methodology is based on the personal interviewing of statistically selected passengers arriving by major modes of transportation at all principal points of entry. Passengers are sampled as they arrive at their first point of entry by Domestic Air, Highway, Cruise Ship, Alaska Marine Highway System and International Air. Sampling is done at Anchorage, Fairbanks, Juneau, Ketchikan, Skagway, Alaska-Canada and Taylor highways, as well as on the State Ferry System from Bellingham and Prince Rupert to Ketchikan. Sampling began in May 1993 and will continue through April 1994. Traffic sampled at these locations is estimated to account for over 96% of all traffic entering Alaska by these modes.

The personal interview technique was selected as the methodology which would best minimize non-response and omit self selection bias, two problems common to travel research projects. Personal interviewing allows for control of the interviewing environment and scientifically accurate selection of respondents. Equally important, personal RAS interviewing has a positive effect on response to the *Visitor Opinion Survey* and *Visitor Expenditure Survey* phases of the program.

The *Visitor Opinion Survey (VOS)* methodology produces and overall usable response rate of 68%, a very high response rate for a mail survey. The effectiveness of the VOS is attributed to the initial personal contact of the RAS interview, the professional appearance of the survey packet and the use of monetary incentives. The extremely high response rate guarantees accurate representation of all visitor types and therefore ensures a high level of reliability in the data.

The VOS Survey Packet

A VOS packet was mailed to every other RAS respondent volunteering their name – 95% of all visitors approached. The "other" RAS respondent was requested to keep the Visitor Expenditure Diary (VES) during the stay. The VOS packets were mailed one to two months after their RAS interview, to give the respondent time to complete their trip and unpack after returning home. Reminder postcards were mailed to all VOS recipients 7 days later.

The VOS packets were mailed in large envelopes with the blue and yellow eagle state logo next to the return address of "State of Alaska Survey, McDowell Group". The packets contained a cover letter on the State of Alaska Department of Commerce and Economic Development, Division of Tourism letterhead, signed by Connell Murray, then Director, requesting the recipient's assistance to "help use make future visits to Alaska more enjoyable and interesting".

The packet included a small envelope containing a monetary incentive of \$1 for pleasure visitors and \$5 for business visitors, with the inscription "McDowell Group thanks you. Please come visit Alaska again." The appropriate foreign currency in equivalent amounts was used for non-U.S. visitors.

The 20-page survey itself, called the "State of Alaska Survey" was printed in 3-color, including the State colors and bound in booklet form. The survey cover ensured the recipients' confidentiality. The survey itself was coded to ensure correct matching to its originating RAS survey to allow for a complete data base on each responding visitor. A return envelope with return postage of foreign exchange unit stamps completed the packet.

VOS packets were not sent to seasonal workers since they are not considered part of the marketing audience for Alaska tourism.

Methodologies by Mode

RAS interviewing methodology is the same for each of the five modes surveyed. However, scientific sampling design and interview interception points vary by mode. The following provides an overview of the arrival count, sample design, and fielding methodologies by mode.

Domestic Air

Domestic air arrival counts were obtained through a voluntary confidential reporting system. All domestic air carriers participated, making possible an analysis of the complete Alaska visitor market.

During the summer months of May through September, the *Random Arrival Survey* was administered by uniformed, professionally trained interviewers who met scientifically selected flights on 37 scientifically selected sample days at four points in Alaska: Anchorage, Fairbanks, Juneau, and Ketchikan. Passengers were identified as residents or non-residents. Every "nth" non-resident was presented a small Alaska lapel pin and interviewed. The number of non-residents interviewed from each flight was four. More than 96% of the non-residents selected through this procedure completed the RAS interview.

Cruise Ship

Cruise Ship arrival count data was obtained through U.S. Customs offices in Ketchikan and Juneau, and verified through Cruise Line Agencies of Alaska.

For the cruise ship sample, random selection of 37 Cruise Ship voyages from May through September was made based upon passenger loads. Uniformed interviewers met each selected ship and interviewed every "nth" passenger as they came ashore. Interviewing procedure was the same as domestic air; the passenger was presented with the lapel pin and then interviewed. A target of 20 interviews were conducted from each vessel, with the sample distributed among passengers taking tours and not taking tours. Nearly all passengers approached agreed to be interviewed, with less than 2% refusing.

Marine Highway

RAS or Arrival count data for the Alaska Marine Highway System was obtained from standard voyage reports generated by the purser's office and available from the Traffic Manager's office in Juneau.

From May through September, uniformed interviewers rode the ferry between Bellingham and Ketchikan, and Prince Rupert and Ketchikan on 30 randomly selected voyages. (Voyages were selected in proportion to passenger loads). During the sailing, interviewers followed a predetermined skip pattern in each section of the vessel to determine resident/non-resident composition and insure random selection of respondents. Passengers were approached according to the skip pattern and the RAS was administered using the same procedure as other modes. Summer season target samples per voyage were 30 on the Bellingham-Ketchikan run and 20 on the Prince Rupert-Ketchikan run. Nearly all passengers approached agreed to complete the interview, with a less than 1% refusal rate.

Highway

Arrival count data was obtained from the U.S. Customs port directors' offices in Alaska-Canada and Skagway and from U.S. Customs headquarters in Anchorage.

Three highway locations were sampled from May through September: the Alaska Highway at Alcan, the Taylor Highway at the Poker Creek border, and the Klondike Highway at Skagway. Forty sample periods were selected based upon traffic patterns and weighted in proportion to traffic volume. A tally of highway traffic was kept to determine resident/non-resident composition. Every "nth" vehicle was administered the *Random Arrival Survey* by uniformed interviewers immediately after clearing customs at Alcan and Skagway, and near the Tok Junction on the Taylor Highway. Only those highway travelers who were entering Alaska for the first time (rather than having arrived via State Ferry or visited somewhere in Alaska previously on this trip) were interviewed. Procedure for administering the RAS was the same as previous modes. Most visitors approached agreed to be interviewed with a refusal rate of less than 2%.

Motorcoach passengers were not interviewed for the Summer 1993 RAS. However, during each sample period, all motorcoaches were stopped and drivers were asked the origin of the motorcoach, the number of passengers and whether the motorcoach was entering Alaska for the first on this trip. This information was used to determine the size of the first arrival motorcoach market.

International Air

International Air arrival count data is obtained through U.S. Customs and Dynair (the company responsible for all ground arrangements for international air carriers) at the Anchorage International Airport.

From May through September international air passengers were administered the RAS on 23 statistically selected sample days by uniformed interviewers. All passengers deplaning on sample days were asked resident/non-resident status as they left U.S. Customs and every "nth" non-resident was interviewed. Sixteen interviews were conducted each sample day. To minimize non-response and to insure a representative sample of all visitors, interviewers were assisted by foreign language questionnaires (in Japanese and German), signs in the customs area, and Japanese, German and Russian-speaking interviewers.

Data Weighting Procedure

Following sample design and actual fielding, raw RAS results are then submitted to a statistical weighting procedure in the data processing phase. This sample weighting insures accurate expansion of sample results to the arriving passenger population.

The weighting is a multistage procedure and includes voyage and flight passenger loads, detailed arrival counts by mode, resident/visitor sample proportions at all sample points by mode, location and time period.

The VOS results are subjected to the same multistage weighting since each survey is matched to its originating RAS survey. Since seasonal workers were not included in the VOS sample, however, the data was then re-weighted to ensure accurate extrapolation to actual visitor population numbers.

Sample Size and Reliability

The final result of the May-September 1993 summer season VOS program is a statistically reliable random sample of 1,434 arriving visitors with a maximum margin of error of $\pm 2.7\%$ and a probable margin of error for most results of $\pm 0.5\%$ to $\pm 2.7\%$. The standard margin of error accepted for most scientifically controlled market studies is usually much greater, $\pm 5.0\%$. The Alaska Visitor Statistics Program insures that even sub-analysis by each individual entry mode is in an acceptable range.

Table A-1

**Visitor Opinion Survey Sample Distribution
Summer 1993**

Mode	Number of Interviews
Domestic Air	423
Cruise Ship	286
Highway	296
Ferry	250
International Air	179
Total	1,434

For Dichotomous (yes/no, percentage-type) Data:

Table A-2

**Visitor Opinion Survey Reliability Intervals
At 95% Confidence Level - Sample Size 1,434**

When Survey Result Is:	Then Maximum Margin Of Error Is:
1% or 99%	$\pm 0.5\%$
10% or 90%	$\pm 1.6\%$
20% or 80%	$\pm 2.2\%$
30% or 70%	$\pm 2.5\%$
40% or 60%	$\pm 2.6\%$
50% or 50%	$\pm 2.7\%$

This table reads: Given the sample size of 1,434, readers may be 95% certain that any state-wide survey result is within a maximum of $\pm 2.7\%$ of the true mean of the survey population.

Table A-3

**VOS Sub-sample Minimum & Maximum Error Levels
At 95% Confidence Level**

Mode	Sample Size	Margin of Error When Survey Result is:	
		1% or 99%	50%
Domestic Air	423	$\pm 1.0\%$	$\pm 4.9\%$
Cruise Ship	286	$\pm 1.1\%$	$\pm 5.9\%$
Highway	296	$\pm 1.1\%$	$\pm 5.8\%$
Ferry	250	$\pm 1.2\%$	$\pm 6.3\%$
International Air	179	$\pm 1.5\%$	$\pm 7.7\%$
Main Trip Purpose			
Vacation/Pleasure	1,154	$\pm 0.6\%$	$\pm 3.0\%$
Visiting Friends & Relatives	116	$\pm 1.8\%$	$\pm 9.4\%$
Business & Pleasure	71	$\pm 2.4\%$	$\pm 11.9\%$
Business Only	93	$\pm 2.0\%$	$\pm 10.0\%$

States Within Geographic Census Regions

WEST

Pacific Coast

California
Hawaii
Oregon
Washington

Mountain

Arizona
Colorado
Idaho
Montana
Nevada
New Mexico
Utah
Wyoming

MIDWEST

West North Central

Iowa
Kansas
Minnesota
Missouri
Nebraska
North Dakota
South Dakota

East North Central

Illinois
Indiana
Michigan
Ohio
Wisconsin

SOUTH

West South Central

Arkansas
Louisiana
Oklahoma
Texas

South Atlantic

Delaware
District of Columbia
Florida
Georgia
Maryland
North Carolina
South Carolina
Virginia
West Virginia

East South Central

Alabama
Kentucky
Mississippi
Tennessee

EAST

New England

Connecticut
Maine
Massachusetts
New Hampshire
Rhode Island
Vermont

Mid Atlantic

New Jersey
New York
Pennsylvania



VOS

Visitor Opinion Survey Instrument





WELCOME HOME FROM ALASKA!

Please help us once again by giving us your opinion about your Alaska visit.

The survey has four parts:

- Traveling to and from Alaska
- Regions of Alaska you visited
- How you planned your Alaska trip
- Basic data on yourself

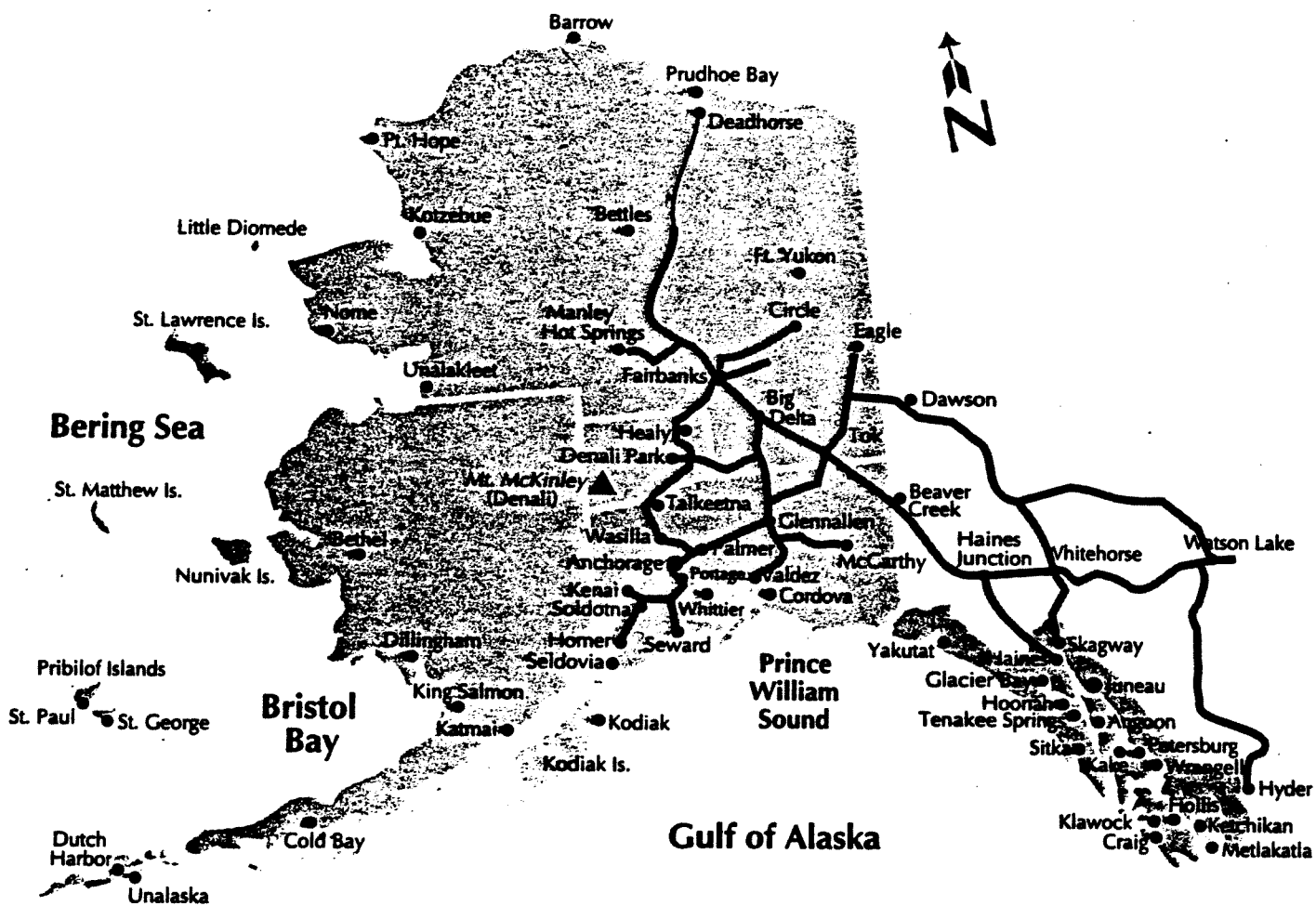
You are part of a small but important sample of visitors to Alaska. It is very important you complete this survey for the results to be truly representative.

ALL RESPONSES REMAIN CONFIDENTIAL

Thank you,

The McDowell Group, Inc.

**STATE
OF
ALASKA
SURVEY**



STATE OF ALASKA SURVEY

Thank you for participating in our Arrival Survey when you visited Alaska recently. Would you help us now by spending a few minutes to make Alaska a better place to visit?

THE SURVEY IS VOLUNTARY AND CONFIDENTIAL - PLEASE DO NOT INCLUDE YOUR NAME. YOUR RESPONSES WILL BE USED ONLY FOR STATISTICAL PURPOSES AND WILL HELP US IMPROVE ALASKA'S FACILITIES, SERVICES, ATTRACTIONS AND TRANSPORTATION.

If you have any questions about completing this survey, please call collect to the State of Alaska Survey Office (907) 586-6126. Thank you!

FIRST, LOOKING AT YOUR OVERALL EXPERIENCE

1. In terms of **VALUE FOR THE MONEY**, how does Alaska **COMPARE** with other vacation destinations you've visited in the past 5 years? Please circle one number for each item which best describes your opinion.

Cruise Passengers: Rate each item as it pertains to your voyage and other parts of your trip, if any. Please complete Question 2 in the same manner.

VALUE FOR THE MONEY	Better					Worse		
Overall	7	6	5	4	3	2	1	
Accommodations	7	6	5	4	3	2	1	
Transportation	7	6	5	4	3	2	1	
To Alaska	7	6	5	4	3	2	1	
From Alaska	7	6	5	4	3	2	1	
Within Alaska	7	6	5	4	3	2	1	
Sightseeing/Attractions	7	6	5	4	3	2	1	
Activities	7	6	5	4	3	2	1	
Restaurants	7	6	5	4	3	2	1	
Friendliness/Helpfulness	7	6	5	4	3	2	1	

2. How well did your trip to Alaska live up to **WHAT YOU EXPECTED** from an Alaska vacation?

COMPARED TO EXPECTATIONS	Exceeded Expectations					Below Expectations		
Overall	7	6	5	4	3	2	1	
Accommodations	7	6	5	4	3	2	1	
Transportation	7	6	5	4	3	2	1	
To Alaska	7	6	5	4	3	2	1	
From Alaska	7	6	5	4	3	2	1	
Within Alaska	7	6	5	4	3	2	1	
Sightseeing/Attractions	7	6	5	4	3	2	1	
Activities	7	6	5	4	3	2	1	
Restaurants	7	6	5	4	3	2	1	
Friendliness/Helpfulness	7	6	5	4	3	2	1	

3. Excluding your recent Alaska trip, which vacation destinations have you visited in the past 5 years? _____

4. **Overall**, how would you rate your most recent Alaska trip experience?

Excellent					Poor		
7	6	5	4	3	2	1	

5a. How likely are you to **recommend** Alaska as a vacation place to your friends, relatives and business associates?

Likely					Unlikely	
7	6	5	4	3	2	1

5b. How likely are you to visit Alaska again in the next 5 years?

For Vacation?	Likely					Unlikely	
	7	6	5	4	3	2	1

For Business?	Likely					Unlikely	
	7	6	5	4	3	2	1

6. What was your main reason for traveling to Alaska on **this** trip?

ABOUT YOUR TRANSPORTATION

7a. What mode of transportation were you using when you crossed the Alaska state line **entering** Alaska on your recent trip?

- | | |
|--|--------------------------|
| 1. Air from other state in U.S. | 5. Highway |
| 2. Air from foreign country | 6. Other (specify) _____ |
| 3. Cruise Ship | _____ |
| 4. Alaska State Ferry
(Alaska Marine Highway) | _____ |

7b. What mode of transportation were you using when you crossed the Alaska state line **leaving** Alaska on your recent trip?

- | | |
|--|--------------------------|
| 1. Air to other state in U.S. | 5. Highway |
| 2. Air to foreign country | 6. Other (specify) _____ |
| 3. Cruise Ship | _____ |
| 4. Alaska State Ferry
(Alaska Marine Highway) | _____ |

8a. If you entered and/or left Alaska by air, did anyone in your party use frequent flyer mileage to come to Alaska?

1. Yes 2. No

8b. If yes, what mileage program was used? _____

8c. How many in your party used it? 1 2 3 4 5 6 or more

9. If you left Alaska by highway, did you take your personal vehicle or a motor coach onto a state ferry when you left Alaska?

1. Yes 2. No

NOW, FOR SOME TRIP FACTS

10. How long ago did you **return** from your recent Alaska trip?

_____ days

11a. How many **nights** did you spend in **Alaska and/or in Alaska waters** on your recent trip? (Do not count nights spent in Canada and Canadian waters.)

_____ nights (If none, please write in "0".)

11b. How many total nights did you spend in each type of lodging in Alaska on your recent Alaska trip? (Do not count nights spent in Canada and Canadian waters.)

_____ Hotel/Motel

_____ RV/Car Campground

_____ Resort/Lodge

_____ Cruise Ship

_____ Bed & Breakfast

_____ Alaska State Ferry

_____ Private Home*

_____ Wilderness camping

_____ Other: _____

(specify)

*Private homes which are not bed and breakfasts.

12. On what date did you leave Alaska? _____

13. How did you make arrangements for your Alaska trip?

1. Bought a packaged trip, tour or cruise of Alaska in advance **for the entire Alaska trip** (includes cruises). Package includes transportation, lodging and sightseeing for a single price in advance.
2. Bought a package trip in advance **for some of the Alaska trip** but made our own travel arrangements for the rest of the trip.
3. Did not purchase any package trip in advance, but bought sightseeing and/or organized activities once inside Alaska.
4. Completely on own with no packages in advance and purchased no sightseeing or organized activities after arriving in Alaska.
5. Other (please explain)

14. Please check each region and each place visited on your recent trip.
(Cruise and ferry passengers: check all places visited, including your ship's
ports of call)

☐ 1. SOUTHEAST

- | | |
|--|--|
| <input type="checkbox"/> Ketchikan | <input type="checkbox"/> Skagway |
| <input type="checkbox"/> Wrangell | <input type="checkbox"/> Wilderness Areas |
| <input type="checkbox"/> Petersburg | _____ |
| <input type="checkbox"/> Sitka | (specify) |
| <input type="checkbox"/> Juneau | <input type="checkbox"/> Other small communities |
| <input type="checkbox"/> Glacier Bay National Park | _____ |
| <input type="checkbox"/> Haines | (specify) |
-

☐ 2. SOUTHCENTRAL

- | | |
|---|--|
| <input type="checkbox"/> Anchorage | <input type="checkbox"/> Soldotna |
| <input type="checkbox"/> Glenallen | <input type="checkbox"/> Homer |
| <input type="checkbox"/> Palmer | <input type="checkbox"/> Other Kenai Peninsula Communities |
| <input type="checkbox"/> Wasilla | <input type="checkbox"/> Wilderness areas |
| <input type="checkbox"/> Prince William Sound | _____ |
| <input type="checkbox"/> Valdez | (specify) |
| <input type="checkbox"/> Cordova | <input type="checkbox"/> Other small communities |
| <input type="checkbox"/> Whittier | _____ |
| <input type="checkbox"/> Seward | (specify) |
| <input type="checkbox"/> Kenai | |
-

☐ 3. INTERIOR / NORTHERN

- | | |
|--------------------------------------|--|
| <input type="checkbox"/> Fairbanks | <input type="checkbox"/> Wilderness areas |
| <input type="checkbox"/> Tok | _____ |
| <input type="checkbox"/> Kotzebue | (specify) |
| <input type="checkbox"/> Nome | <input type="checkbox"/> Other small communities |
| <input type="checkbox"/> Barrow | _____ |
| <input type="checkbox"/> Prudhoe Bay | (specify) |
-

☐ 4. SOUTHWEST

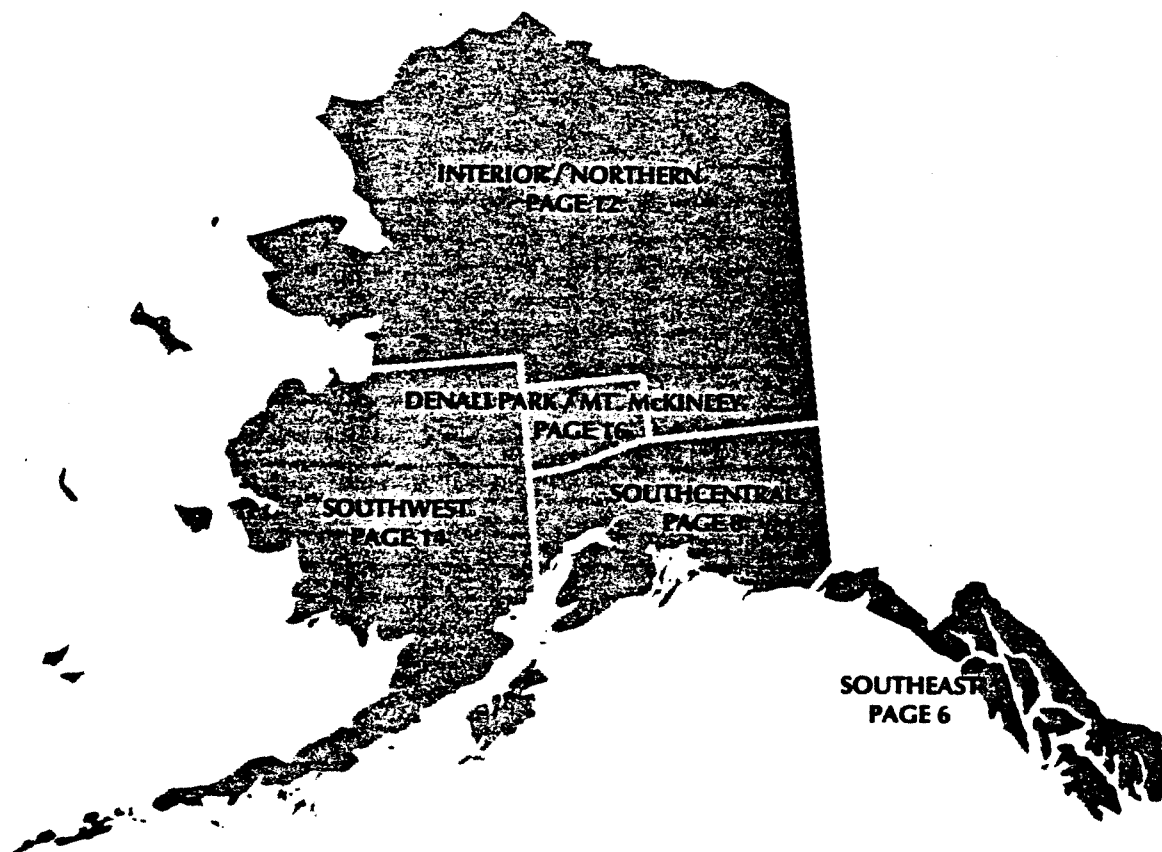
- | | |
|--------------------------------------|--|
| <input type="checkbox"/> Kodiak | <input type="checkbox"/> Dillingham |
| <input type="checkbox"/> Katmai | <input type="checkbox"/> Wilderness areas |
| <input type="checkbox"/> Iliamna | _____ |
| <input type="checkbox"/> King Salmon | (specify) |
| <input type="checkbox"/> Aleutians | <input type="checkbox"/> Other small communities |
| <input type="checkbox"/> Pribilofs | _____ |
| <input type="checkbox"/> Bethel | (specify) |
-

☐ 5. DENALI PARK / MT. MCKINLEY

- ☐ Outside park
☐ Inside park
☐ Back country (inside park)

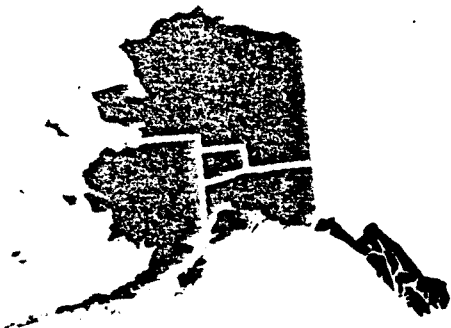
15. Which of these types of travel best describes your trip?

1. Round trip cruise on a cruise ship
2. Cruise and a packaged land tour of Alaska **with two or more nights on land in Alaska.**
3. One-way cruise and air **with one or no nights on land in Alaska.**
4. Fishing resort package
5. Wilderness adventure package
6. Round trip on Alaska State Ferry plus driving around Alaska
7. Round trip on Alaska State Ferry only
8. One way on Alaska State Ferry plus driving around Alaska
9. One way on Alaska State Ferry and other travel around Alaska
10. Other type of trip (explain) _____



PLEASE COMPLETE THE QUESTIONS ON EACH OF THE INDICATED PAGES FOR REGIONS YOU VISITED, COMPLETE ONLY THE PAGES FOR THOSE REGIONS YOU VISITED ON YOUR RECENT ALASKA TRIP.

SOUTHEAST REGION



COMPLETE THIS SECTION IF YOU VISITED SOUTHEAST ALASKA ON YOUR RECENT ALASKA TRIP.

16. In the SOUTHEAST Region, how many **nights** did you stay in each of the following places and in what type of **lodging**?

Indicate Number of Nights in each Lodging Type									
	TOTAL NIGHTS	Hotel/Motel	Resort/Lodge	Bed & Breakfast	Private Home*	RV/Car Camp	Cruise	State Ferry	Other
AT SEA									
Ketchikan									
Wrangell									
Petersburg									
Sitka									
Juneau									
Glacier Bay									
Haines									
Skagway									
Wilderness areas (specify)									
Other small communities (specify)									

*Private homes which are not bed and breakfasts.

PLEASE RATE EACH ASPECT OF YOUR STAY IN SOUTHEAST ALASKA ON A ONE TO SEVEN SCALE WHERE 7 = EXCELLENT AND 1 = POOR. CIRCLE THE NUMBER WHICH BEST DESCRIBES YOUR OPINION. PLEASE CIRCLE THE "X" IF YOU DID NOT USE OR PARTICIPATE IN ANY PARTICULAR ITEM.

17. LODGING:

	Excellent							Poor	Didn't Use
Hotel/Motel	7	6	5	4	3	2	1	X	
Resort/Lodge	7	6	5	4	3	2	1	X	
Bed & Breakfast	7	6	5	4	3	2	1	X	
RV/Car Campground	7	6	5	4	3	2	1	X	
Cruise Ship	7	6	5	4	3	2	1	X	
Alaska State Ferry	7	6	5	4	3	2	1	X	
Other (specify)	7	6	5	4	3	2	1	X	

18. TRANSPORTATION WITHIN REGION:

Air	7	6	5	4	3	2	1	X
Alaska State Ferry	7	6	5	4	3	2	1	X
Bus	7	6	5	4	3	2	1	X
Cruise Ship	7	6	5	4	3	2	1	X
Rental Car	7	6	5	4	3	2	1	X
Rental RV	7	6	5	4	3	2	1	X
Train	7	6	5	4	3	2	1	X

19. RESTAURANTS / NIGHTLIFE:

	7	6	5	4	3	2	1	X
--	---	---	---	---	---	---	---	---

20. SHOPPING:

	7	6	5	4	3	2	1	X
--	---	---	---	---	---	---	---	---

21. VISITOR INFORMATION CENTERS:

	7	6	5	4	3	2	1	X
--	---	---	---	---	---	---	---	---

22. SIGHTSEEING:

SIGHTSEEING:	Excellent							Poor	Didn't Use
City Tours	7	6	5	4	3	2	1	X	
Day Cruises	7	6	5	4	3	2	1	X	
Flightseeing	7	6	5	4	3	2	1	X	
Native Cultural Presentations	7	6	5	4	3	2	1	X	
Shows/Alaska Entertainment	7	6	5	4	3	2	1	X	
Other Tours	7	6	5	4	3	2	1	X	

23. CULTURAL ATTRACTIONS / MUSEUMS:

	7	6	5	4	3	2	1	X
--	---	---	---	---	---	---	---	---

24. ACTIVITIES:

Bird watching	7	6	5	4	3	2	1	X
Camping	7	6	5	4	3	2	1	X
Casual walking	7	6	5	4	3	2	1	X
Hiking	7	6	5	4	3	2	1	X
Hunting	7	6	5	4	3	2	1	X
Photography	7	6	5	4	3	2	1	X
Wildlife watching	7	6	5	4	3	2	1	X
Canoeing/Kayaking	7	6	5	4	3	2	1	X
Rafting	7	6	5	4	3	2	1	X
Fishing overall	7	6	5	4	3	2	1	X
Fresh water fishing	7	6	5	4	3	2	1	X
Salt water fishing	7	6	5	4	3	2	1	X
Cross country skiing	7	6	5	4	3	2	1	X
Downhill skiing	7	6	5	4	3	2	1	X
Dog sledding	7	6	5	4	3	2	1	X
Northern Lights viewing	7	6	5	4	3	2	1	X
Snowmobiling	7	6	5	4	3	2	1	X
Other (specify)	7	6	5	4	3	2	1	X

25a. Please check each of the following attractions you visited in SOUTHEAST Alaska.

- ☐ Alaska State Museum
- ☐ Chilkat Bald Eagle Preserve near Haines
- ☐ Chilkat Dancers in Haines
- ☐ Eaglecrest Ski Area
- ☐ Glacier Bay National Park
- ☐ Inside Passage
- ☐ Ketchikan area totems
- ☐ Mendenhall Glacier
- ☐ Misty Fjords National Monument
- ☐ Sitka's National Historical Park (including totems & exhibit center)
- ☐ Sitka's Russian church and dancers
- ☐ Skagway's historic Gold Rush District
- ☐ Tracy Arm - Fords Terror Wilderness

WHEN YOU COMPLETE THE QUESTIONS FOR ALL REGIONS YOU VISITED, PLEASE PROCEED TO PAGE 17 AND FINISH THE SURVEY. THANK YOU.

SOUTHCENTRAL REGION

COMPLETE THIS SECTION IF YOU VISITED SOUTHCENTRAL ALASKA ON YOUR RECENT ALASKA TRIP.

16. In the SOUTHCENTRAL Region, how many nights did you stay in each of the following places and in what type of lodging?

Indicate Number of Nights in each Lodging Type

	TOTAL NIGHTS	Hotel/Motel	Resort/Lodge	Bed & Breakfast	Private Home*	RV/Car Camp	Cruise	State Ferry	Other
AT SEA									
Anchorage									
Glenallen									
Palmer									
Wasilla									
Valdez									
Cordova									
Whittier									
Seward									
Kenai									
Soldotna									
Homer									
Wilderness areas (specify)									
Other small communities (specify)									

*Private homes which are not bed and breakfasts.

PLEASE RATE EACH ASPECT OF YOUR STAY IN SOUTHCENTRAL ALASKA ON A ONE TO SEVEN SCALE WHERE 7 = EXCELLENT AND 1 = POOR. CIRCLE THE NUMBER WHICH BEST DESCRIBES YOUR OPINION. PLEASE CIRCLE THE "X" IF YOU DID NOT USE OR PARTICIPATE IN ANY PARTICULAR ITEM.

17. LODGING:

LODGING:	Excellent							Poor	Didn't Use
Hotel/Motel	7	6	5	4	3	2	1	X	
Resort/Lodge	7	6	5	4	3	2	1	X	
Bed & Breakfast	7	6	5	4	3	2	1	X	
RV/Car Campground	7	6	5	4	3	2	1	X	
Cruise Ship	7	6	5	4	3	2	1	X	
Alaska State Ferry	7	6	5	4	3	2	1	X	
Other (specify)	7	6	5	4	3	2	1	X	

18. TRANSPORTATION WITHIN REGION:

	Excellent							Poor	Didn't Use
Air	7	6	5	4	3	2	1		X
Bus	7	6	5	4	3	2	1		X
Cruise Ship	7	6	5	4	3	2	1		X
Rental Car	7	6	5	4	3	2	1		X
Rental RV	7	6	5	4	3	2	1		X
Alaska State Ferry	7	6	5	4	3	2	1		X
Train	7	6	5	4	3	2	1		X

19. RESTAURANTS / NIGHTLIFE:

	7	6	5	4	3	2	1	X
--	---	---	---	---	---	---	---	---

20. SHOPPING:

	7	6	5	4	3	2	1	X
--	---	---	---	---	---	---	---	---

21. VISITOR INFORMATION CENTERS:

	7	6	5	4	3	2	1	X
--	---	---	---	---	---	---	---	---

22. SIGHTSEEING:

City Tours	7	6	5	4	3	2	1	X
Day Cruises	7	6	5	4	3	2	1	X
Flightseeing	7	6	5	4	3	2	1	X
Native Cultural Presentations	7	6	5	4	3	2	1	X
Shows/Alaska Entertainment	7	6	5	4	3	2	1	X
Other Tours	7	6	5	4	3	2	1	X

23. CULTURAL ATTRACTIONS / MUSEUMS:

	7	6	5	4	3	2	1	X
--	---	---	---	---	---	---	---	---

SOUTHCENTRAL Region Continued next page



SOUTHCENTRAL Region Continued from page 9

24. ACTIVITIES:

	Excellent							Poor	Didn't Use
Bird watching	7	6	5	4	3	2	1		X
Camping	7	6	5	4	3	2	1		X
Casual walking	7	6	5	4	3	2	1		X
Hiking	7	6	5	4	3	2	1		X
Hunting	7	6	5	4	3	2	1		X
Photography	7	6	5	4	3	2	1		X
Wildlife watching	7	6	5	4	3	2	1		X
Canoeing/Kayaking	7	6	5	4	3	2	1		X
Rafting	7	6	5	4	3	2	1		X
Fishing overall	7	6	5	4	3	2	1		X
Fresh water fishing	7	6	5	4	3	2	1		X
Salt water fishing	7	6	5	4	3	2	1		X
Cross country skiing	7	6	5	4	3	2	1		X
Downhill skiing	7	6	5	4	3	2	1		X
Dog sledding	7	6	5	4	3	2	1		X
Northern Lights viewing	7	6	5	4	3	2	1		X
Snowmobiling	7	6	5	4	3	2	1		X
Other (specify)	7	6	5	4	3	2	1		X

25a. Please check each of the following attractions you visited in SOUTHCENTRAL Alaska.

Anchorage area:

- | | |
|--|---|
| <input type="checkbox"/> Alyeska Ski Resort | <input type="checkbox"/> Portage Glacier |
| <input type="checkbox"/> Anchorage Museum of History and Art | <input type="checkbox"/> Potter Point State Game Refuge |
| <input type="checkbox"/> Chugach State Park | <input type="checkbox"/> St. Nicholas, Russian Orthodox Church and Native Spirit Houses (Eklutna) |
| <input type="checkbox"/> Crow Creek Mine | |
| <input type="checkbox"/> Lake Hood Air Harbor | |

Kenai Peninsula:

- | | |
|---|---|
| <input type="checkbox"/> Kachemak Bay | <input type="checkbox"/> Kenai River |
| <input type="checkbox"/> Kenai Fjords National Monument | <input type="checkbox"/> Resurrection Bay |
| <input type="checkbox"/> Kenai National Wildlife Refuge | |

Matanuska-Susitna area:

- | | |
|--|---|
| <input type="checkbox"/> Alaska State Fair | <input type="checkbox"/> Matanuska Glacier |
| <input type="checkbox"/> Hatcher Pass Recreation Area | <input type="checkbox"/> Museum of Alaska Transportation and Industry |
| <input type="checkbox"/> Iditarod Museum | <input type="checkbox"/> Musk Ox Farm |
| <input type="checkbox"/> Independence Mine State Historic Park | |
| <input type="checkbox"/> Knik Glacier | |

Prince William Sound:

- | |
|---|
| <input type="checkbox"/> College Fjord |
| <input type="checkbox"/> Columbia Glacier |
| <input type="checkbox"/> Prince William Sound |
| <input type="checkbox"/> Valdez Pipeline Terminal |

PLEASE CONTINUE ON NEXT PAGE...

WHEN YOU COMPLETE THE QUESTIONS FOR ALL REGIONS YOU VISITED,
PLEASE PROCEED TO PAGE 17 AND FINISH THE SURVEY. THANK YOU.

INTERIOR/ NORTHERN REGION



COMPLETE THIS SECTION IF YOU VISITED INTERIOR/NORTHERN ALASKA ON YOUR RECENT ALASKA TRIP.

16. In the INTERIOR/NORTHERN Region, how many **nights** did you stay in each of the following places and in what type of **lodging**?

Indicate Number of Nights in each Lodging Type

	TOTAL NIGHTS	Hotel/ Motel	Resort/ Lodge	Bed & Breakfast	Private Home*	RV/Car Camp	Other
Fairbanks							
Tok							
Kotzebue							
Nome							
Barrow							
Prudhoe Bay							
Wilderness areas (specify)							
Other small communities (specify)							

*Private homes which are not bed and breakfasts.

PLEASE RATE EACH ASPECT OF YOUR STAY IN INTERIOR/NORTHERN ALASKA ON A ONE TO SEVEN SCALE WHERE 7 = EXCELLENT AND 1 = POOR. CIRCLE THE NUMBER WHICH BEST DESCRIBES YOUR OPINION. PLEASE CIRCLE THE "X" IF YOU DID NOT USE OR PARTICIPATE IN ANY PARTICULAR ITEM.

17. LODGING:

LODGING:	Excellent							Poor	Didn't Use
Hotel/Motel	7	6	5	4	3	2	1	X	
Resort/Lodge	7	6	5	4	3	2	1	X	
Bed & Breakfast	7	6	5	4	3	2	1	X	
RV/Car Campground	7	6	5	4	3	2	1	X	
Other (specify)	7	6	5	4	3	2	1	X	

18. TRANSPORTATION WITHIN REGION:

Air	7	6	5	4	3	2	1	X
Bus	7	6	5	4	3	2	1	X
Rental Car	7	6	5	4	3	2	1	X
Rental RV	7	6	5	4	3	2	1	X
Train	7	6	5	4	3	2	1	X

19. RESTAURANTS / NIGHTLIFE:

	7	6	5	4	3	2	1	X
--	---	---	---	---	---	---	---	---

20. SHOPPING:

	7	6	5	4	3	2	1	X
--	---	---	---	---	---	---	---	---

21. VISITOR INFORMATION CENTERS:

	7	6	5	4	3	2	1	X
--	---	---	---	---	---	---	---	---

22. SIGHTSEEING:

	Excellent						Poor	Didn't Use
City Tours	7	6	5	4	3	2	1	X
Riverboat Cruises	7	6	5	4	3	2	1	X
Flightseeing	7	6	5	4	3	2	1	X
Native Cultural Presentations	7	6	5	4	3	2	1	X
Shows/Alaska Entertainment	7	6	5	4	3	2	1	X
Other Tours	7	6	5	4	3	2	1	X

23. CULTURAL ATTRACTIONS / MUSEUMS:

	7	6	5	4	3	2	1	X
--	---	---	---	---	---	---	---	---

24. ACTIVITIES:

Bird watching	7	6	5	4	3	2	1	X
Camping	7	6	5	4	3	2	1	X
Casual walking	7	6	5	4	3	2	1	X
Hiking	7	6	5	4	3	2	1	X
Hunting	7	6	5	4	3	2	1	X
Photography	7	6	5	4	3	2	1	X
Wildlife watching	7	6	5	4	3	2	1	X
Canoeing/Kayaking	7	6	5	4	3	2	1	X
Rafting	7	6	5	4	3	2	1	X
Fishing overall	7	6	5	4	3	2	1	X
Fresh water fishing	7	6	5	4	3	2	1	X
Salt water fishing	7	6	5	4	3	2	1	X
Cross country skiing	7	6	5	4	3	2	1	X
Downhill skiing	7	6	5	4	3	2	1	X
Dog sledding	7	6	5	4	3	2	1	X
Northern Lights viewing	7	6	5	4	3	2	1	X
Snowmobiling	7	6	5	4	3	2	1	X
Other (specify)	7	6	5	4	3	2	1	X

25a. Please check each of the following attractions you visited in INTERIOR/NORTHERN Alaska.

Fairbanks area:

- ☐ AlaskaLand
☐ Chena Riverboat trips
☐ Gold panning, dredges and saloons
☐ Hot Springs
☐ TransAlaska Pipeline

- ☐ University of Alaska
☐ University of Alaska Museum
☐ Large Animal Research Station (Musk Ox Farm)
☐ Agricultural and Forestry Experiment Station Farm
☐ Geophysical Institute

Other Northern areas

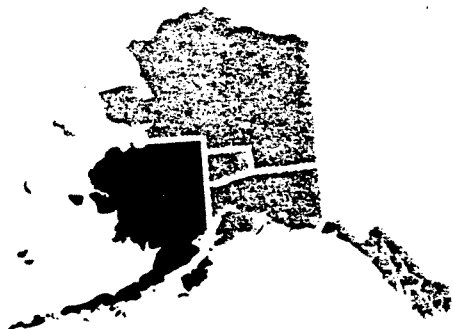
- ☐ Arctic National Wildlife Refuge
☐ Barrow - Northernmost point in North America
☐ Brooks Range
☐ Gates of the Arctic National Park
☐ Kotzebue - Eskimo culture
☐ Nome - Gold Rush History and Eskimo culture
☐ TransAlaska Pipeline Haul Road
☐ Prudhoe Bay oil fields

Other Interior Areas

- ☐ Alaska Highway
☐ Tetlin National Wildlife Refuge

WHEN YOU COMPLETE THE QUESTIONS FOR ALL REGIONS YOU VISITED, PLEASE PROCEED TO PAGE 17 AND FINISH THE SURVEY. THANK YOU.

SOUTHWEST REGION



COMPLETE THIS SECTION IF YOU VISITED SOUTHWEST ALASKA ON YOUR RECENT ALASKA TRIP.

16. In the SOUTHWEST Region, how many **nights** did you **stay** in each of the following places and in what type of **lodging**?

Indicate Number of Nights in each Lodging Type

	TOTAL NIGHTS	Hotel/Motel	Resort/Lodge	Bed & Breakfast	Private Home*	RV/Car Camp	Cruise	State Ferry	Other
AT SEA									
Kodiak									
Katmai									
Iliamna									
King Salmon									
Aleutians									
Pribilofs									
Bethel									
Dillingham									
Lodges:									
Alaska Peninsula									
Bristol Bay Area									
Kodiak Island Area									
Lake Clark/Lake Iliamna Area									
Wilderness areas (specify)									
Other small communities (specify)									

*Private homes which are not bed and breakfasts.

PLEASE RATE EACH ASPECT OF YOUR STAY IN SOUTHWEST ALASKA ON A ONE TO SEVEN SCALE WHERE 7 = EXCELLENT AND 1 = POOR. CIRCLE THE NUMBER WHICH BEST DESCRIBES YOUR OPINION. PLEASE CIRCLE THE "X" IF YOU DID NOT USE OR PARTICIPATE IN ANY PARTICULAR ITEM.

17. LODGING:

	Excellent							Poor	Didn't Use
Hotel/Motel	7	6	5	4	3	2	1	X	
Resort/Lodge	7	6	5	4	3	2	1	X	
Bed & Breakfast	7	6	5	4	3	2	1	X	
RV/Car Campground	7	6	5	4	3	2	1	X	
Cruise Ship	7	6	5	4	3	2	1	X	
Alaska State Ferry	7	6	5	4	3	2	1	X	
Other (specify)	7	6	5	4	3	2	1	X	

18. TRANSPORTATION WITHIN REGION:

Air	7	6	5	4	3	2	1	X
Alaska State Ferry	7	6	5	4	3	2	1	X
Bus	7	6	5	4	3	2	1	X
Cruise Ship	7	6	5	4	3	2	1	X
Rental Car	7	6	5	4	3	2	1	X
Rental RV	7	6	5	4	3	2	1	X

19. RESTAURANTS / NIGHTLIFE:	Excellent							Poor	Didn't Use
	7	6	5	4	3	2	1		X

20. SHOPPING:	7	6	5	4	3	2	1		X
---------------	---	---	---	---	---	---	---	--	---

21. VISITOR INFORMATION CENTERS:	7	6	5	4	3	2	1		X
----------------------------------	---	---	---	---	---	---	---	--	---

22. SIGHTSEEING:									
City Tours	7	6	5	4	3	2	1		X
Day Cruises	7	6	5	4	3	2	1		X
Flightseeing	7	6	5	4	3	2	1		X
Native Cultural Presentations	7	6	5	4	3	2	1		X
Shows/Alaska Entertainment	7	6	5	4	3	2	1		X
Other Tours	7	6	5	4	3	2	1		X

23. CULTURAL ATTRACTIONS / MUSEUMS:	7	6	5	4	3	2	1		X
-------------------------------------	---	---	---	---	---	---	---	--	---

24. ACTIVITIES:									
Bird watching	7	6	5	4	3	2	1		X
Camping	7	6	5	4	3	2	1		X
Casual walking	7	6	5	4	3	2	1		X
Hiking	7	6	5	4	3	2	1		X
Hunting	7	6	5	4	3	2	1		X
Photography	7	6	5	4	3	2	1		X
Wildlife watching	7	6	5	4	3	2	1		X
Canoeing/Kayaking	7	6	5	4	3	2	1		X
Rafting	7	6	5	4	3	2	1		X
Fishing overall	7	6	5	4	3	2	1		X
Fresh water fishing	7	6	5	4	3	2	1		X
Salt water fishing	7	6	5	4	3	2	1		X
Cross country skiing	7	6	5	4	3	2	1		X
Downhill skiing	7	6	5	4	3	2	1		X
Dog sledding	7	6	5	4	3	2	1		X
Northern Lights viewing	7	6	5	4	3	2	1		X
Snowmobiling	7	6	5	4	3	2	1		X
Other (specify)	7	6	5	4	3	2	1		X

25a. Please check each of the following attractions you visited in SOUTHWEST Alaska.

- | | |
|--|---|
| <input type="checkbox"/> Aleutian Islands | <input type="checkbox"/> Lake Clark National Park |
| <input type="checkbox"/> Baranof Museum (Kodiak) | <input type="checkbox"/> Pribilof Islands |
| <input type="checkbox"/> Ft. Abercrombie (Kodiak) | <input type="checkbox"/> Round Island |
| <input type="checkbox"/> Katmai National Park | <input type="checkbox"/> Russian Orthodox Church (Kodiak) |
| <input type="checkbox"/> Kodiak National Wildlife Refuge | <input type="checkbox"/> Wood River - Tikchik State Park |

WHEN YOU COMPLETE THE QUESTIONS FOR ALL REGIONS YOU VISITED, PLEASE PROCEED TO PAGE 17 AND FINISH THE SURVEY. THANK YOU.

DENALI PARK/ MT. MCKINLEY REGION



COMPLETE THIS SECTION IF YOU VISITED
DENALI PARK/MT. MCKINLEY ALASKA ON YOUR RECENT ALASKA TRIP.

16. In the DENALI PARK/MT. MCKINLEY Region, how many nights did you stay in each of the following places and in what type of lodging?

Indicate Number of Nights in each Lodging Type

	TOTAL NIGHTS	Hotel/Motel	Resort/Lodge	Bed & Breakfast	Private Home*	RV/Car Camp	Other
Outside Park							
Inside Park							
Back Country (Inside park)							

*Private homes which are not bed and breakfasts.

PLEASE RATE EACH ASPECT OF YOUR STAY IN DENALI PARK/MT. MCKINLEY ALASKA ON A ONE TO SEVEN SCALE WHERE 7 = EXCELLENT AND 1 = POOR. CIRCLE THE NUMBER WHICH BEST DESCRIBES YOUR OPINION. PLEASE CIRCLE THE "X" IF YOU DID NOT USE OR PARTICIPATE IN ANY PARTICULAR ITEM.

17. LODGING:

LODGING:	Excellent							Poor	Didn't Use
Hotel/Motel	7	6	5	4	3	2	1	X	
Resort/Lodge	7	6	5	4	3	2	1	X	
Bed & Breakfast	7	6	5	4	3	2	1	X	
RV/Car Campground	7	6	5	4	3	2	1	X	
Other (specify)	7	6	5	4	3	2	1	X	

18. TRANSPORTATION WITHIN REGION:

Air	7	6	5	4	3	2	1	X
Bus	7	6	5	4	3	2	1	X
Rental Car	7	6	5	4	3	2	1	X
Rental RV	7	6	5	4	3	2	1	X
Train	7	6	5	4	3	2	1	X

19. RESTAURANTS / NIGHTLIFE:

	7	6	5	4	3	2	1	X
--	---	---	---	---	---	---	---	---

20. SHOPPING:

	7	6	5	4	3	2	1	X
--	---	---	---	---	---	---	---	---

21. VISITOR INFORMATION CENTERS:

	7	6	5	4	3	2	1	X
--	---	---	---	---	---	---	---	---

22. SIGHTSEEING:

	Excellent							Poor	Didn't Use
Park/Bus Tour	7	6	5	4	3	2	1		X
Flightseeing	7	6	5	4	3	2	1		X
Other Tours	7	6	5	4	3	2	1		X

23. CULTURAL ATTRACTIONS / MUSEUMS:

	7	6	5	4	3	2	1		X
--	---	---	---	---	---	---	---	--	---

24. ACTIVITIES:

Bird watching	7	6	5	4	3	2	1		X
Camping	7	6	5	4	3	2	1		X
Casual walking	7	6	5	4	3	2	1		X
Hiking	7	6	5	4	3	2	1		X
Hunting	7	6	5	4	3	2	1		X
Photography	7	6	5	4	3	2	1		X
Wildlife watching	7	6	5	4	3	2	1		X
Canoeing/Kayaking	7	6	5	4	3	2	1		X
Rafting	7	6	5	4	3	2	1		X
Fishing overall	7	6	5	4	3	2	1		X
Fresh water fishing	7	6	5	4	3	2	1		X
Salt water fishing	7	6	5	4	3	2	1		X
Cross country skiing	7	6	5	4	3	2	1		X
Downhill skiing	7	6	5	4	3	2	1		X
Dog sledding	7	6	5	4	3	2	1		X
Northern Lights viewing	7	6	5	4	3	2	1		X
Snowmobiling	7	6	5	4	3	2	1		X
Other (specify)	7	6	5	4	3	2	1		X

THINK BACK FOR A MOMENT TO WHEN YOU WERE PLANNING YOUR RECENT ALASKA TRIP

25b. Please tell us what prompted you to actually decide to visit Alaska **this year**?

26. What other destination, if any, did you *consider for this vacation year* before deciding on Alaska?

1. None 2. The following: _____

27. Why did you choose Alaska for this trip rather than that destination?

28. How long before the trip did you decide what season and year you would make this recent trip?

_____ years _____ months before the trip.

29. How long before the trip did you make your travel arrangements?
_____ years _____ months before the trip.

30a. Where did you get information to help plan your recent Alaska trip BEFORE departure?

30b. How, if at all, did a travel agent help you for this Alaska trip?
(Circle all that apply.)

1. Provided brochures
2. Recommended or suggested you visit Alaska
3. Recommended or suggested a particular travel company to use
4. Recommended or suggested lodging
5. Recommended or suggested a form of transportation/type of trip, i.e., air, cruise
6. Recommended or suggested specific places of interest, sites or cities to visit
7. Booked a tour or cruise package for you
8. Booked independent lodging, transportation, i.e., flights, or activities/attractions for you
9. Other _____
(please specify)
10. Didn't use travel agent at all

31. Did you send for the State of Alaska Official Vacation Planner?

1. Yes
2. No

32a. Did you receive any unsolicited brochures?

1. Yes
2. No

32b. If yes, about how many? _____

33. Have you read any special newspaper travel sections on Alaska?

1. Yes
2. No

34. What was the biggest misconception you had about Alaska that was cleared up by your visit?

35a. What did you *plan* to do in Alaska that you *did not* do?

35b. What did you *do* in Alaska that you *had not planned* to do?

YOUR TRAVEL PATTERNS

36. Excluding your recent Alaska trip, how many **vacations** outside the continental US. have you taken in the last 5 years? (Circle one)
0 1 2 3 4 5 6 or more
37. Again, excluding your recent Alaska trip, how many **vacations** to destinations 2,000 miles or more from your home have you taken in the last 5 years? (Circle one)
0 1 2 3 4 5 6 or more
38. Excluding your recent Alaska trip, what was the destination of your last vacation 2,000 miles or more from home?

39. How long ago did you take that vacation?
_____ years _____ months
40. What one destination would you **most like to visit next** for vacation?

- 41a. What one destination will you **probably visit next** for vacation?

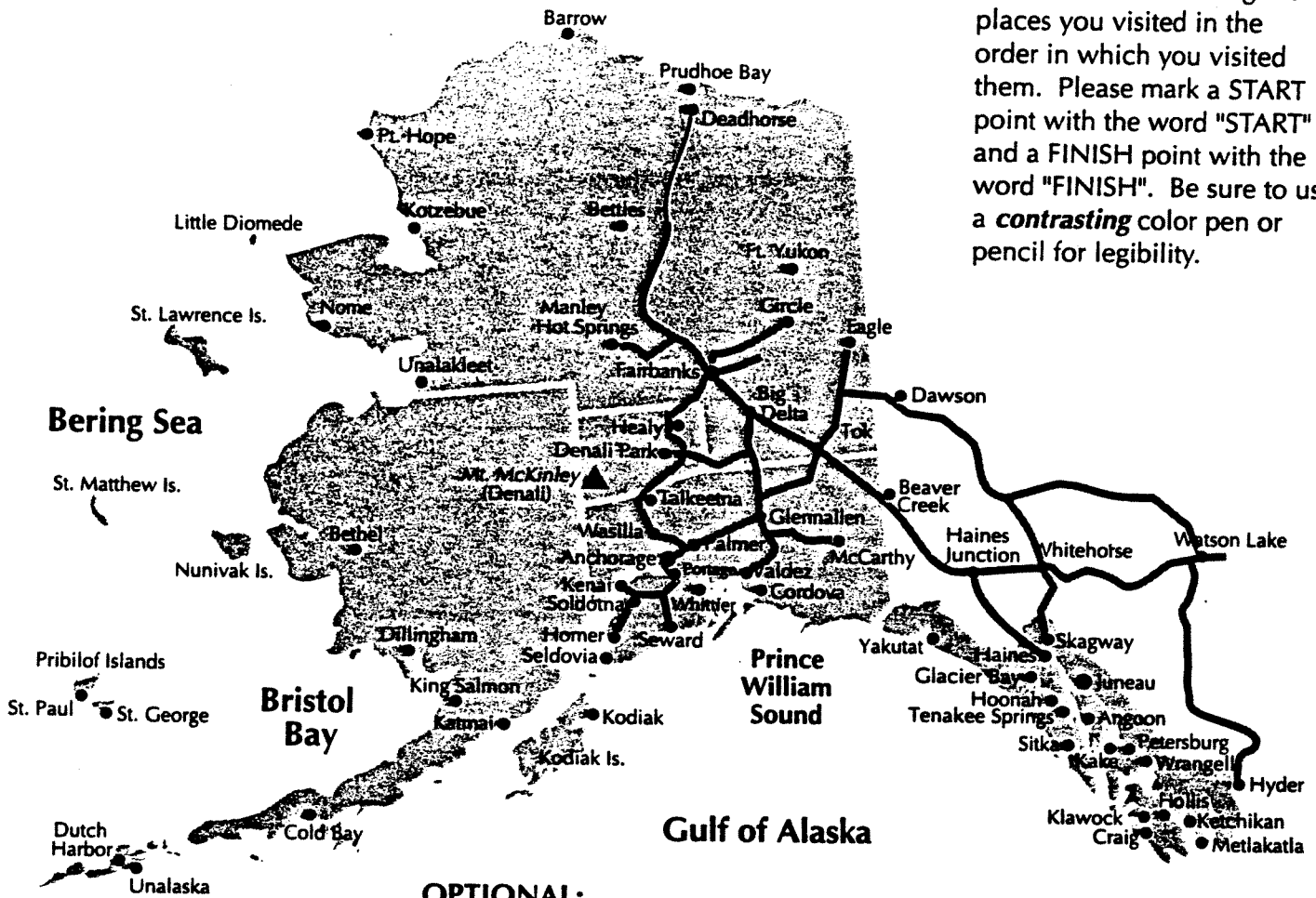
- 41b. When do you plan to take that next vacation?
_____ years _____ months

FOR CLASSIFICATION PURPOSES ONLY

42. Please circle the highest level of formal education you had the opportunity to complete:
1. Grade 11 or less
 2. Graduated from high school
 3. 1-3 years of college
 4. Graduated from college
 5. Attended or completed graduate school
43. Your total household income, before taxes, including pensions, dividends and interest, social security, annuities and investment earnings of all types:
- | | |
|------------------------|--------------------------|
| 1. Under \$25,000 | 5. \$75,000 - \$99,999 |
| 2. \$25,000 - \$34,999 | 6. \$100,000 - \$199,999 |
| 3. \$35,000 - \$49,999 | 7. \$200,000 and over |
| 4. \$50,000 - \$74,999 | |

PLEASE
CONTINUE TO
NEXT PAGE...
THANK YOU.

44. Will you please show us your route through Alaska on your recent trip using this map. Draw a line connecting the places you visited in the order in which you visited them. Please mark a **START** point with the word "START" and a **FINISH** point with the word "FINISH". Be sure to use a *contrasting* color pen or pencil for legibility.



OPTIONAL:

45. To summarize, please list your itinerary and transportation between places for your recent trip:

<u>From</u>	<u>To</u>	<u>By...</u>						
			Alaska State Ferry	Auto	Bus	Train	Other	
Hometown		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

THANK YOU for your cooperation. You have very generously helped make Alaska a better place to visit. We sincerely hope you will visit the 49th State again soon.